PHED COMMITTEE #1
October 8, 2007

MEMORANDUM

Committee members should bring the Planning Board's Growth Policy report and the October 1 PHED packet to this worksession.

TO: Planning, Housing, and Economic Development Committee

FROM: GO Glenn Orlin, Deputy Council Staff Director
MF Michael Faden, Senior Legislative Attorney

SUBJECT: County Growth Policy: public school adequacy test; further discussion on sustainability and design excellence

Public School Adequacy Test

1. Council staff recommendations: summary

1. **Set the school test threshold at 110% of MCPS Program Capacity at each level in each cluster, with no borrowing excess capacity from outside a cluster.**
2. **Count 5 years' worth of enrollment growth and capacity.**
3. **Freeze the program capacity calculations between biennial updates (for Growth Policy purposes only), except when new capacity is added.**
4. **Set staging ceilings for each cluster at each level. Calculate those ceilings in terms of available seat capacity.**
5. **Where a staging ceiling is negative, let a development proceed if it provides sufficient permanent classroom space to meet the demand it generates.**
6. **Exempt subdivisions of 3 or fewer units from the school test.**
7. **Repeal the School Facilities Payment.**

The background on this issue and rationale for our recommendations follows. Excerpts from the Growth Policy report regarding the proposed schools test are on ©1-21. Planning staff's responses to questions raised by the Building Industry Association and Committee Chair Praisner are on ©22-27. Relevant excerpts from the Planning Board's September 28 transmittal are on ©28-36.

2. ***Background.*** The Planning Board recommended further tightening the school adequacy test, which was previously tightened in 2003 and took effect in 2004. The pre-2004 test, the current test, and the Planning Board's proposed test are summarized below:

Pre-2004 Test	Current Test	Proposed Test
Levels tested: ES, MS & HS	Levels tested: ES, MS & HS	Levels tested: ES, MS & HS
Growth Policy Capacity (GPC): 25 students/ES classroom 22.5 students/MS&HS room	Growth Policy Capacity (GPC): 25 students/ES classroom 22.5 students/MS&HS room	MCPS program capacity (PC): 23 students/reg ES classroom 21.25 students/reg MS classroom 22.5 students/reg HS classroom less for special program rooms
Adequacy: 110% of GPC @ all levels	Adequacy: 100% of GPC @ HS; 105% of GPC @ MS&ES	Adequacy: 110% of PC @ all levels
Borrow capacity from abutting clusters? Yes, @ all levels.	Borrow capacity from abutting clusters? Only @ HS level.	Borrow capacity from abutting clusters? No.
Years out enrollment projected: 5	Years out enrollment projected: 5	Years out enrollment projected: 5
Years out capacity counted: 5	Years out capacity counted: 5	Years out capacity counted: 5
Relocatables counted? No.	Relocatables counted? No.	Relocatables counted? No.
School facilities payment? None.	School facilities payment? 100-110% GPC @ HS level. 105-110% GPC @ MS/ES level.	School facilities payment? 110-135% PC @ all levels.
School facilities payment rate: none	School facilities payment rate: $12,500 @ each level	School facilities payment rates: $32,524 @ ES level; $42,351 @ MS level; $47,501 @ HS level

Under the pre-2003 test, no cluster went into moratorium. (During the mid-1990's, when the Paint Branch Cluster was technically over capacity by 5 students, and the capacity solution -- an addition in the adjacent Sherwood Cluster -- was one year away from being 'countable', the Council voted 5-4 not to put the Paint Branch Cluster into moratorium for that year.) The test was tightened in 2003 to the point where, if the MCPS CIP had not changed, 4 clusters would have gone into moratorium. However, during the same year the Council approved a historically large increase for the MCPS CIP, from $637 million to $913 million, funding enough capacity that no cluster failed the tighter test.

In 2003, the Council also enacted the option of a School Facilities Payment for housing projects in clusters where projected enrollment would exceed 100% Growth Policy Capacity at the HS level (allowing borrowing from adjacent clusters) or 105% at the MS and ES levels (no borrowing allowed), but would not exceed 110% of Growth Policy capacity. The funds from the payment would be sued for improvements to address the capacity shortfall in the specific cluster and school level. No School Facilities Payments were made since it became law.

The proposed test would use program capacity as the measure, eliminate borrowing at the HS level, change the threshold where the School Facilities Payment can be used, and raise the size of the payment. Under the proposed test, a Payment would be required in 7 of the 25 clusters (see Option 2B, ©17). In other ways the test is not changed: capacity must be available at all 3 school levels; enrollment is compared to capacity 5 years out; and only permanent classrooms, but not portables, are counted as capacity.

*3. **Testimony and correspondence.*** The County Executive supports the proposed test but would set the threshold at 100% of program capacity, not 110%. Under his recommendation, 17 of the 25 clusters would require a School Facilities Payment (see Option 2A, ©16).

The Board of Education concurs with the Planning Board's recommendation, with 2 exceptions. First, for purposes of the schools test program capacity would be held constant for 2 years, regardless of what program changes occur between Growth Policy cycles. This addresses the possibility that a program change could result in an area requiring or not requiring a School Facilities Payment, or, potentially, an area going in or out of moratorium. (The Planning Board now also endorses this approach.) Second, it would let funds raised from School Facilities Payments be used wherever capacity needs arise in the system.

MCCPTA is concerned that 135% of program capacity is too high a threshold for an area to go into moratorium. They also believe that the School Facilities Payment may be too conservative because payments would only be made if a specific school level were between 110-135%. They point out that if an elementary school is in that range, eventually a middle school and the high school in the cluster are likely to also fall into that range, so the payment should be made in all 3 areas.

Many individuals have written to the Council expressing their dissatisfaction with the concept of a School Facilities Payment. They recognize it as a form of 'Pay and Go,' where a housing development can buy its way out of providing adequate school capacity without the guarantee that school capacity will actually be provided before the housing development is occupied.

4. Measuring capacity. Over the past few years MCPS has tightened its definition of school capacity. There are more teaching stations assigned to special programs which call for smaller class sizes. The class-size reduction program in elementary schools was accommodated by adding portables, but now these portables are considered part of the overcrowding problem. The program capacity for a regular middle school classroom has been tightened from 22.5 to 21.25 students per teaching station. The difference between FY 2004 and FY 2008 is striking:

Level	Total Program Capacity as % of Total Growth Policy Capacity FY 2004	Total Program Capacity as % of Total Growth Policy Capacity FY 2008	% Change of FY 2008 Ratio to FY 2004 Ratio
High Schools	94.22%	93.61%	-0.6%
Middle Schools	92.33%	86.53%	-6.3%
Elem. Schools	91.58%	85.65%	-6.5%
All levels	92.56%	88.28%	-4.6%

This table shows that the program capacity definition has tightened by 4.6% overall during the past 4 years, and by over 6% at the middle and elementary school levels. Therefore, MCPS's newer, tighter definition of program capacity has had as much to do with school 'overcrowding' as growth in enrollment.

Council staff recommends utilizing 110% of program capacity as the threshold for the adequacy of public school capacity, without borrowing excess capacity from other clusters. Our recommendation is not 100% of program capacity based on the fact that most enrollment growth is not attributable to new development anyway, and the recent policy change that space for the

elementary level class reduction program should be provided in permanent classrooms rather than portables.

For the last decade the school test has measured enrollment to capacity 5 years out to determine adequacy. Before that the comparison was made 4 years out. The change was made because, at the time, the average residential subdivision took about 5 years to build out, and the same rule was used for the transportation test.

For the Policy Area Mobility Review test, the Planning Board recommended comparing traffic demand from existing development plus the approved pipeline of development to capacity on the ground 6 years in the future. For Local Area Transportation Review the Board would retain the current practice, which compares traffic demand from existing development plus the approved pipeline of development to capacity on the ground 4 years in the future. So the three major Growth Policy analyses would look 4, 5, or 6 years into the future.

For better public understanding and acceptance, a single standard time frame would be useful. Planning staff's analysis shows that an average residential subdivision still takes about 5 years to build out, while a non-residential subdivision takes about 9 years to be opened. Therefore, we recommend continuing to use the 5-year time-frame for the school test. The immediate outcome of using 110% program capacity over a 5-year time-frame is that the following clusters would exceed the adequacy threshold (see ©17):

ES: Blake, Clarksburg, Einstein, Kennedy, Northwest, and Wheaton
MS: Clarksburg
HS: Wootton

Alternatively, if the Council were to use a 115%, 5-year test, the following clusters would exceed the adequacy threshold (see ©18):

ES: Blake, Einstein, and Kennedy
MS: Clarksburg

At the Council's request, the Planning Board also calculated the impact of a 4-year time-frame for several adequacy threshold levels (100%, 110%, 115%, etc.). The result of this analysis is on ©37. If the Growth Policy uses a 110%, 4-year test, the following clusters would exceed the adequacy threshold:

ES: Blake, Einstein, Kennedy, Northwest, and Wheaton
MS: Clarksburg
HS: Wootton

If the Growth Policy uses a 115%, 4-year test, the following clusters would exceed the adequacy threshold:

ES: Blake, Einstein, and Kennedy

*5. **Staging ceilings.*** The current school test is a 'pass/fail' test: if the enrollment-to-capacity threshold is not exceeded at all three levels in a cluster, then there is no limit on the

amount on further residential development that can be approved in that cluster—until the test is recalculated a year later. This leaves the potential for a large development to be approved that would drive the cluster into the 'inadequate' range.

The former Policy Area Review test included staging ceilings: the amount of development that could occur in a policy area before the threshold was reached. Council staff believes this concept should be applied to the school test.

How would it work? Take the example of a school test using 110% of program capacity over a 5-year time frame (©17). Note that while the B-CC cluster is considered adequate over all three levels, that it is only barely adequate—by 5 students—at the elementary level. Using MCPS's student generation factors (©30), 5 elementary school students would be generated by 16 single-family-detached houses ($5 \div 0.320 \approx 16$), or by 24 townhouses ($5 \div 0.211 \approx 24$), or by 33 garden apartments ($5 \div 0.153 \approx 33$), or by 119 high-rise units ($5 \div 0.042 \approx 119$). It is easy to imagine that a single residential development in the B-CC cluster area (which includes the Bethesda CBD) could cause the elementary levels in the cluster to exceed the threshold.

6. The School Facilities Payment. As noted above, this was invented 4 years ago as a relief valve. If a cluster threatened to go over capacity a moratorium would not go into effect; instead a sizable payment would be exacted to be used eventually to solve the overcrowding problem. No payment has been made to date, but with the Planning Board's proposal—and especially with the Executive's proposal—it would take on a prominent role in the Growth Policy right away.

Council staff advised against the School Facilities Payment 4 years ago, and we do so again now. First, if the School Impact Tax rates are set as recommended by the Planning Board—so that new development will pay 100% of the marginal infrastructure cost it incurs—then what is the justification of charging more than 100% with this payment?

More fundamentally, however, the School Facilities Payment—just like its 'Pay-and-Go' precursor—is antithetical to the Adequate Public Facilities Ordinance, which the Growth Policy is supposed to implement. The idea of the APFO is to provide adequate roads, schools, and other public facilities *concurrently* with new housing, offices, retail, etc. As the Board of Education noted, the School Facilities Payments likely will not accrue in any cluster to the degree needed to provide new school capacity on a timely basis. But the BOE's solution also undercuts the purpose of the APFO: pooling these funds practically guarantees that a capacity solution will not be provided where the new developments that will make the payments are located.

However, the Committee could consider allowing a School Facilities Payment for developers of small residential subdivisions which, realistically, could not fund permanent additions to schools. If the Committee recommends retaining the School Facilities Payment (either generally or only for small subdivisions), Council staff will offer recommendations to the MFP Committee on October 15 regarding the rate and whether it should be credited against the School Impact Tax.

*7. **De minimus development.*** An even simpler approach would be to exempt small residential subdivisions from the school test entirely. This *de minimus* principle has always been part of the transportation test. Before 2004, subdivisions generating 5 or fewer peak-hour trips were exempt from Policy Area Transportation Review, and subdivisions generating fewer than 50 peak-hour trips were exempt from Local Area Transportation Review (LATR). The 2003-2005 Growth Policy eliminated Policy Area Review altogether, but it tightened LATR such that subdivisions generating fewer than 30 peak-hour trips were exempt, and those generating between 30-49 peak-hour trips could, at the Planning Board's discretion, pass LATR by either mitigating its traffic or making a Development Approval Payment.

Council staff recommends that a subdivision of 1-3 units be exempt from the school test. According to MCPS's student generation rates, a 3-unit subdivision of single-family detached homes would generate only 1 elementary school student, and even fewer at other levels.

*8. **Developer participation.*** The school test could incorporate two concepts used in the transportation test. One would be a variation of the 'ceiling flexibility' provision, which would allow a development to proceed in a 'moratorium' cluster if it built, or provided all the funds to build, a permanent addition which provides as much or more capacity than the number of school children generated at that level by the development. Realistically, this approach would only work for large housing developments that would generate enough students to fill a reasonably-sized addition: at least 6 rooms.

The other concept would have the development supplement the funding for a County-funded addition to produce a larger addition that would accommodate the increment of students generated by the development. In each case, of course, the participation would not occur by right; MCPS would have to approve the addition.

Sustainability and Design Excellence

The Committee Chair asked the Committee to take more time discussing these aspects of the Growth Policy before the Council's semi-annual review on October 16 of the Planning Board's work program. Relevant information about these issues is in the October 1 PHED Committee packet on ©E-F, N, 13-15, and 19-47.

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Montgomery County Public Schools

Since 1986, when the Annual Growth Policy (Growth Policy) was first applied, Montgomery County Public Schools (MCPS) enrollment has grown from 94,460 to 137,798 students. This is an increase of almost 50 percent. Although, there was a decline in enrollments in the 1970s and early 1980s, the public school student population grew steadily through the 1990s. By 2006 school enrollment reached a plateau and declined slightly, according to data contained in the FY 2008 *Recommended Capital Budget and Amendments to the FY 2007-2012 Capital Improvements Program*. This is the first school year with an enrollment decline since 1983. Enrollment is projected to rise again in a few years because the increase in the number of births was higher since 2000. Annual births have exceeded 13,000 since 2000.

In 2003, when staff last analyzed the school test, enrollment was 138,891 students and MCPS was in the process of modernizing and building additions to many of the existing schools, as well as opening new schools. MCPS has made a concerted effort over the last few years to reduce the number of relocatable classrooms. The approved *FY 2007-2012 MCPS Capital Improvements Program* (CIP) is still addressing the number of relocatable classrooms through additions and modernizations. This CIP report notes that by the end of the current CIP the number of relocatable classrooms projected to be in use will be 337. This is a reduction from the 719 previously in use in 2005-06. MCPS proposes to further reduce the relocatable classrooms to 229 by the 2012-13 school year if additional funding is provided. MCPS facility planning is increasingly directed at school additions and modernizations rather than new schools. There are 179 elementary schools, 38 middle schools, 25 high school, 6 special schools, and one career and technology center in the system.

School Test Methodology

The County Council approves the school test methodology in the Growth Policy resolution. Once the Council approves the CIP, MCPS recalculates the projected school capacity (based on final determination of funded capacity) and provides all data for the school test as required by the Adequate Public Facilities Ordinance (APFO).

The current Growth Policy school test uses a definition of capacity based on a standard multiplier. For example, kindergarten capacity is set at 22 students per classroom; grades 1-5 at 25 students per classroom and grades 6-12 are set at a capacity of 22.5 students per classroom. The test compares capacity available in the 6th year of the funded CIP to enrollment projections for the same year. (This is equivalent to the 5th year of the Growth Policy test.) Forecasts of enrollment and capacity are prepared by MCPS staff and reviewed by the Montgomery County Planning Board staff before the Council reviews the school test.

The School Test language in the Growth Policy is:

Public School Facilities

S1 Geographic Areas

For the purposes of public school analysis and local area review of school facilities at time of subdivision, the County has been divided into 24 areas called high school clusters, as shown in Map 32. These areas coincide with the cluster boundaries used by the Montgomery County Public School system.

The groupings used are only to administer the Adequate Public Facilities Ordinance and do not in any way require action by the Board of Education in exercising its power to designate school service boundaries.

S2 School Capacity Measures

The Planning Board must evaluate available capacity in each high school cluster and compare enrollment projected by Montgomery County Public Schools for each fiscal year with projected school capacity in 5 years. If sufficient high school capacity will not be available in any cluster, the Planning Board must determine whether an adjacent cluster will have sufficient high school capacity to cover the projected deficit.

The Planning Board must use 100% of Council-funded capacity at the high school level and 105% of Council-funded capacity at the middle and elementary school level as its measures of adequate school capacity. This capacity measure does not count relocatable classrooms in computing a school's permanent capacity.

Council-funded regular program classroom capacity is based on calculations that assign 25 students for grades 1-6, 44 students for half day kindergarten where it is currently provided, 22 students for all day kindergarten where it is currently provided, and an effective class size of 22.5 students for secondary grades.

S3 Grade Levels

Each cluster must be assessed separately at each of the three grade levels -- elementary, intermediate/middle, and high school.

S4 Determination of Adequacy

After the Council has approved the FY 2005-2010 CIP, the Planning Board must recalculate the projected school capacity at all grade levels in each high school cluster. If the Board finds that public school capacity will be inadequate at any grade level in any cluster, but the projected enrolment at that level will not exceed 110% of capacity, the Board may approve a residential subdivision in that cluster during FY 2005 if the applicant commits to pay a School Facilities Payment as provided in County law before receiving a building permit for any building in that subdivision. If projected enrollment at any grade level in that cluster will exceed 110% of capacity, the Board must not approve any residential subdivision in that cluster during FY 2005.

After the Council in 2005 has approved the amended FY 2005-2010 CIP, the Planning Board again must recalculate school capacity. If capacity at any level is projected to be inadequate, the Board must take the actions specified in the preceding paragraph in FY 2006.

S5 Senior Housing

If public school capacity in inadequate in any cluster, the Planning Board may nevertheless approve a subdivision in that cluster if the subdivision consists solely of multifamily housing and related facilities for elderly or handicapped persons or multifamily housing units located in the age-restricted section of a planned retirement community.

S6 Clusters in municipalities

If public school capacity will be inadequate in any cluster that is wholly or partly located in Rockville, Gaithersburg, or Poolesville, the Planning Board may nevertheless approve residential subdivisions in that cluster unless the respective municipality restricts the approval of similar subdivisions in its part of the cluster because of inadequate school capacity.

The final clause, S6, was written before Gaithersburg and Rockville adopted school tests that are more stringent than Montgomery County's. As a result, the provision can be read two completely different ways. It was intended to allow the Planning Board to continue to approve subdivisions in policy areas that the Growth Policy test showed as inadequate if the municipality did not honor the County-imposed moratorium. It can now be read to suggest that the Montgomery County Planning Board may not approve subdivisions in a cluster that overlaps a municipality if that municipality declares that schools are inadequate.

Gaithersburg and Rockville

The MCPS serves the entire county including the municipalities. School demographers incorporate new residential development from the municipalities with development approval authority into enrollment forecasts. Rockville and Gaithersburg have recently adopted adequate public facilities ordinances that include a schools adequacy test.

The City of Gaithersburg Ordinance No.01-107, approved in 2007, amends Chapter 24 of the City Code, and states ".... residential development shall not be approved if the subject property is within the attendance area ... forecasted to have a student population that exceeds 110 percent of the Montgomery Public Schools Program Capacity two years in the future." Sharing of capacity between schools is not permitted.

The City of Rockville adopted an APFO with standards on November 1, 2005 that limits residential development where enrollment surpasses school program capacity. The determination of adequacy is based on program capacity as reported to the Board of Education with an increase of 105 percent for elementary and middle schools and 100 percent for high schools within a 2 year time frame, no borrowing permitted. Adequacy is determined by school, not cluster.

Both Rockville and Gaithersburg define adequacy as a percentage over school program capacity with no borrowing – in contrast to the County's school test, which uses "Growth Policy Capacity" and allows borrowing at the high school level. While Rockville and Gaithersburg's schools tests are stricter than the County's test, Rockville's is the stricter of the two and under current forecasts; a number of elementary schools serving the city are over capacity.[1]

Factors Considered by MCPS

Adequate school capacity is a calculation that compares projected enrollment numbers and existing and planned facility capacity based on program needs.

Enrollment

MCPS staff develops the enrollment numbers by using actual birth rates to establish a base kindergarten cohort for the year and then projects enrollment through 12th grade using a "cohort survivorship model." The forecast is adjusted for in/out migration; factors that apply to specific schools and growth from newly approved but not yet built development. Students from new development are added to the forecast when it appears that the development will be online during the six-year forecast period. The number of students generated from new development is calculated by housing unit type. Enrollment forecasts are developed every year in September and revised in March.

MCPS Program Capacity

The Superintendent's Recommended FY 2008 CIP contains modifications to the previous CIP school capacity calculations. The completion of phasing in full-day kindergarten eliminated the need to calculate half-day kindergarten. Middle school capacity had been calculated at a factor of 0.9, which apparently overstated capacity, and was adjusted to a capacity factor of 0.85.

Growth Policy Capacity

The Growth Policy school test uses its own capacity calculation based on a standard multiplier, which is then compared to the forecasts for enrollment for the 6th year of the CIP (5th year of the Growth Policy test). This Growth Policy capacity is multiplied by 105 percent to set elementary and middle school test capacities. High school capacity is 100 percent with borrowing allowed between clusters in the test. The Growth Policy capacity is greater than MCPS program capacity. The greatest amount of difference occurs when Growth Policy capacity is used for elementary schools with class-size reduction.

[1] September 12, 2005 Table, Enrollment Trends...Within the City of Rockville, page 17, APFO Ordinance.

Evidence of Change

The success of the school system is dependent on the quality of the facilities and services provided to students and the continuous improvements and adaptations to the learning environment. The School Board acknowledges this in their policy statement regarding facilities planning:

> *"Enrollment in MCPS is constantly changing. The fundamental goal of facilities planning is to provide a sound educational environment for changing enrollment. The number of students, their geographic distribution, and the demographic characteristics of this population all impact facilities planning. Net enrollment changes are driven by factors including birthrates, movement within the school system and into the school system from other parts of the United States and the world."*

Enrollment forecasts change for a number of reasons, both demographic and economic, and actual enrollment may differ from projected enrollment. One example of the possible influence of the local economic effects is the cost of housing. Median sales of single-family units (attached and detached) as well as rental housing rose dramatically between 2000 and 2005. School demographers think that this is contributing to a decline in enrollment in previously affordable areas of the county.

Changes to school capacity also reflect policy changes. For example, all day kindergarten requires more classroom space. The on-going initiative to reduce the inventory of relocatable classrooms translates into more school additions. Other policies have translated into smaller classroom size for elementary grades and gymnasiums in all elementary schools. Middle school policies are under current scrutiny.

MCPS staff briefed the Council regarding demographic trends earlier this year.[2] Findings in the report include:

- Total enrollment declined this year; net migration is variable; net immigration (foreign born students) is significant but declining.
- Percentage enrollment in public schools (rather than private schools) has been stable at 81 to 82 percent of county school population for the last 15 years.
- Enrollment in non-focus schools is up but down at focus schools (class-size reduction schools) since 2003, however focus school enrollment for ethnic groups other than white is increasing.
- FARMS (Free and Reduced Price Meals) enrollment is rising.
- The demographic composition of the student body is very different from that in 1970. This shift began in 1980s; since then, white enrollment has been steadily decreasing, while enrollment in all other race/ethnic categories has increased.

[2] January 29, 2007 *Education Committee Briefing on MCPS Demographic Trends.*

During the 2003 review of the schools test, MCPS staff prepared a report, *Factors Affecting Montgomery County Public Schools, Enrollment Change* (February 11, 2003). MCPS staff updated that report for this study and it was included in the second growth policy study interim report. A comparison between the 2003 and 2007 reports underscores the conclusion that the composition of enrollment is experiencing change: FARMS participation in 2003 was 22 percent compared to 23.5 percent in 2007 and ESOL enrollment in 2003 was 8.5 percent as compared to 10.7 percent in 2007. The projected births as compared to actual births for the same years were accurate, within 1 or 2 percent.

TABLE 1: Comparison of Projected and Actual Births

Years	2003 Births Projected	2007 Births Actual
2002	13,200	13,154
2003	13,250	13,529
2004	13,300	13,546
2005	13,350	13,507

Source: MCPS Staff Report, March 23, 2007

MCPS continually reviews the enrollment factors and finds that changes in enrollment stem from both new construction and turnover of existing housing. Examples of this observation are noted in the March 23, 2007 update. College Gardens and Rosemont Elementary Schools serve the King Farm in Rockville. Although more than 3,000 units were built in the King Farm development, enrollment remained at the same level as before development began, because enrollment was declining in other parts of the school's service area. When the existing housing in these neighborhoods turns over, however, there may be impacts on enrollment. In the case of Spark Matsunaga Elementary School, there was no older community and housing completions came on line faster than anticipated. Enrollment there is higher than anticipated even with the opening of a second elementary school.

Analysis

Is the current school test effective?

MNCPPC staff in 2003 conducted an extensive review of the school test and made five recommendations to the school test, which the County Council enacted.

- Continue to use the current definition of school capacity;
- Consider schools to be adequate at 105%of Growth Policy capacity for elementary and middle schools and 100 % of Growth Policy capacity for high schools;
- Discontinue the practice of borrowing for elementary and middle schools;

- Require developers to make a payment when projected enrollment exceed the standard (proposed 105% and 100%) but does not exceed 110%;
- Impose an absolute moratorium when enrollment exceeds 110%.

The analysis explained and reviewed the definition and calculation of capacity, including program capacity, adjusted Growth Policy capacity, state rated capacity and core capacity and concluded that standard multipliers were the best approach. The review included the standard of adequacy, the geography (cluster) the adjacent capacity (borrowing), point of application and exemptions/de minimis.

The FY 2007 Growth Policy schools test shows that all the clusters are adequate (Appendix 1); the same finding made in FY 2006. In fact, the test has resulted in only one finding of inadequacy since 1986. Perhaps the test is extremely effective – stimulating the construction of school facilities to a degree that keeps pace with growing demand – or perhaps the test is a paper exercise, designed to report a finding of adequacy no matter what the "real life" conditions.

There is some truth to both sides. The County has come close to failing the school test on several occasions and the public response was to program more school facilities, not relax the adequacy standard. On the other hand, there is a gap between the growth policy adequacy standard and the capacity standard used by the school system. That difference is the reason that the school test has (almost) always found every cluster to be adequate. If the MCPS program capacity were used, several clusters would be over capacity and would fail the Growth Policy test.

The school test calculation has been modified over the years and has gotten progressively tighter. In previous years, the Growth Policy test used a standard of 110 percent of capacity to accommodate over enrollment and allowed borrowing between school clusters at the elementary and middle school levels. In 2003, the school test was adjusted so that the capacity is set at 105 percent (except for high schools) and no borrowing is permitted at the elementary and middle school levels. That step would have brought several clusters into moratorium, if not for a huge increase in school capacity added to the County's CIP.

If there is a desire to have a school test that is more sensitive to the effects of new development and other changes in school enrollment, a logical option would be to tighten the schools test in some way, such as setting the adequacy standard at 100 percent of Growth Policy capacity (or switching to MCPS program capacity) and eliminating the provision for borrowing.

The enrollment figures indicate that the school test is not sensitive only to the effects of new development. Test results reflect change all over the County, including older, already-developed areas. In the Bethesda-Chevy Chase (BCC) cluster, for example, there is a projected elementary enrollment of 3,036 in 2011 and the cluster is deemed adequate under the school test. However, there is a need for CIP projects in the cluster to address overcapacity at the high school, middle and elementary school levels. In the

case of the B-CC cluster, the capacity issue can't be linked to growth from new development, because the cluster is in an established area where there has been little new development. The growth is related to a turnover in the neighborhoods or the tearing down and rebuilding of existing housing stock.

Are there aspects of the methodology that should be changed?

Capacity

One issue with the methodology is how classroom capacity is calculated, including what constitutes a "classroom" and whether to use *Growth Policy capacity* (standard multiplier) or MCPS *program capacity* (determined by each classroom's use). MCPS recently changed the calculation of the program capacity number for middle schools. According to the FY 2008 CIP, the multiplier for middle school program capacity was changed because it was found that the existing method overstated capacity. The multiplier was reduced from .9 to .85 (page3-1, 2008 CIP).

Current program capacity reflects the small classroom initiative for designated "Focus" schools. This initiative requires smaller classroom sizes for kindergarten and grades 1 and 2: kindergarten classes have 15 students per classroom and the first and second grades have 17 per classroom. This staffing level requires more classrooms per Focus school and many of those schools are currently overcapacity.

The gap between program capacity and Growth Policy capacity becomes clearer when the Growth Policy capacity is set at 100 percent or 105 percent (current test). Table 2 (Options 1A and 1B) prepared by MCPS, illustrates those different options. At 105 percent Growth Policy capacity, Clarksburg elementary school capacity is adequate. If capacity is calculated at 100 % Growth Policy capacity, Clarksburg fails. When MCPS program capacity is used (Table 2, Option 2A, 2B and 2C) for the Growth Policy test, many clusters fail. At 100% of MCPS program capacity, 15 clusters fail at the elementary level, two at the middle school level, two at the high school level (when no borrowing is allowed). As the percentage increases to 110% of MCPS program capacity, the failure rate decreases, but Clarksburg Middle School continues to fail and elementary schools in the Blake, Einstein and Kennedy clusters continue to fail. Of these clusters, only in Clarksburg can overcapacity be fully related to new housing growth. In other clusters, changing demographics in the built-up part of the County results in findings of inadequacy under the program capacity options. Table 2, Options 3A, 3B and 3 C show a Growth Policy test only for the Clarksburg cluster, illustrating an idea to apply the school test only in areas of the County where new development clearly plays the greatest rolls in students enrollment changes.

There has been discussion regarding using core capacity as the standard. Core capacity is the part of the school needed to support the school curriculum, such the lunchroom, and gymnasium and media center. For example, new elementary schools and ones undergoing modernization are designed with a core that can support

approximately 640 or 740 students. However, great variability of core size among older schools makes it impossible to use core capacity as a useful concept.

Accuracy of Forecasts

All forecasts are less accurate as the forecast horizon is extended. Inflection points (where a trend changes direction) are especially difficult to forecast. The forecast in 2003 for 2006 enrollment was 143,800 and actual 2006 enrollment was under 140,000.

Student Generation from New Developments

The Census Update Survey shows that fewer students are generated from higher density units, such as townhouses, apartments and condominiums. School demographers have evidence that neo-traditional/transit oriented development generates *even* fewer students. These student generation rate assumptions and the statistics underlying them are constantly reviewed, along with review of the changing nature of planned housing.

More detailed analysis of student generation from different housing types, and a comparison between student generations rates from new units and enrollments in older neighborhoods helps adjust these multipliers for local conditions. The MCPS staff conducts this type of sampling to refine enrollment forecasts.

MCPS staff and MNCPPC Research staff have discussed whether a special survey of neo-traditional/transit-oriented development is warranted to document the observed low student generation rates. At this time, we do not believe a survey would be helpful because of the small sample size and the somewhat loose definition of this type of development. However, staff is considering adding a question about house size or number of bedrooms to the next Census Update Survey, the answers to which would have uses beyond student generation rates.

Conclusions/Recommendations

Revise the test so that the definition of adequacy more closely conforms to the MCPS definition of capacity by lowering the threshold that triggers the School Facilities Payment. That threshold should be based on "MCPS program capacity," not "Growth Policy capacity" but should be inflated to avoid the problems that have kept the County from using program capacity in the past.

In addition, for the purposes of determining if a School Facilities Payment is required, the practice of "borrowing" high school capacity should not be used. Staff recommends that the threshold be when enrollment reaches 110 percent of program capacity, which would cause development in the following clusters to pay the school facilities payment: Blake, Clarksburg, Einstein, Kennedy, Northwest, Wheaton, and Wootton. If policymakers prefer to continue to use "Growth Policy capacity," staff would recommend that the threshold for the School Facilities Payment be set at the point when enrollment

reaches 95 percent of capacity. This would cause residential development to pay the School Facilities Payment in Bethesda-Chevy Chase, Blake, Clarksburg, Kennedy, Northwest, Quince Orchard, and Springbrook.

Staff understands that some may believe that a threshold be set at 110 percent of program capacity is too high and argue that any threshold over 100 percent of capacity is out of step with the best possible measurement of capacity. Staff considered this point of view because the school test already partially addresses the concern about using program capacity because it basically averages enrollment and capacity for all schools in the cluster. Staff remains with the 110 percent recommendation in large part to account for the relative effect of new and existing development on school capacity.

The purpose of this recommendation is two-fold: to have the adequacy test contribute toward understanding which schools require additional investments, and to trigger contributions from new development at a point closer to when schools are over-capacity. The current school test provides little in the way of information to guide capital investments, nor has it ever resulted in the School Facilities Payment being paid, despite the fact that subdivisions are being approved in clusters that are over capacity.

Increase the School Facilities Payment from $12,500 per student to $32,524 for each full-time equivalent elementary school student, $42,351 for each middle school student, and $47,501 for each high school student. This figure is derived from per-student costs for new schools, a calculation that is explained in some detail in the Infrastructure Financing section.

This is approximately the full cost-per-student of new school facilities. With this recommendation, staff is supporting a point of view that when facilities are inadequate, new development should not make the problem worse.

This recommendation would assess the school facilities payments separately for each level: elementary, middle, and high schools. If a development project were located in a cluster where only the *elementary* schools are inadequate, it would make the payment for each *elementary* school student generated. Each single-family detached home generates, on average, 0.32 elementary students, so the School Facilities Payment in this case would be $10,407.

Retain the upper limit so that when enrollment greatly exceeds capacity, development approvals in that cluster stop. This upper limit, which is the threshold for imposing a strict moratorium on new development that generates students, has very rarely been exceeded, but when it was, new school facilities were promptly programmed. This suggests to staff that there is some utility to retaining a standard that serves an "alarm" function when enrollment and capacity are *severely* out of balance. Currently, the strict moratorium threshold is based on "Growth Policy capacity." If the threshold for a School Facilities Payment is changed to be expressed as program capacity, staff would suggest that a threshold for the strict moratorium, equivalent to the current threshold but expressed as program capacity, be found.

Consider capturing development that occurs outside the subdivision process. As smaller housing units are replaced with larger ones, or are expanded with additions, some additional student generation can be expected. There is sufficient academic study of this issue to legitimately link student generation to size of home. Although the total number of additional students is small, the County could consider applying the School Facilities Payment or the School Impact Tax to these properties. Staff is not yet ready to make a recommendation on this issue because we have not reviewed the number, type and location of these replacements/expansions. Possibly this issue could be studied along with the "mansionization" issue or in future Growth Policy studies.

It is clear from the MCPS data that change is occurring in older areas where no new or sizable development is occurring. GIS could be used to determine if changes in older neighborhoods are creating school capacity issues by tracking building permit and other data. Development such as teardowns, large additions including bedrooms, and minor subdivision approvals, may not add lots, but may generate new students

Make some technical corrections. The current Growth Policy Resolution *implies* that the Planning Board must continue to conduct the School test annually even if the Council fails to pass a new Growth Policy resolution, but explicit language is needed. The language in the Growth Policy concerning school clusters in municipalities did not anticipate that municipalities would pass APFOs that are more stringent than Montgomery County's. As a result, the provision can be read two completely different ways.

Monitor the Office of Legislative Oversight (OLO) review of indicators for Montgomery County Public Schools to see if they serve as a basis for further modification of the School Test.

The *Office of* Legislative Oversight (OLO), *Key Fiscal Indicators for Montgomery County Public Schools*, indicates that although enrollment has reached a plateau, the FY 07 MCPS operating budget was 31% larger than four years ago. The study focused on the operating budget and found that the increase in the number of teachers, costs of special education and costs associated with the salaries and benefits contributed to increased operating costs. The study included discussion of expanding the indicators to include measuring the efficiency and effectiveness of "successful' students in addition to the costs of educating each student. The OLO report recommended that the County Council consider assigning OLO a FY 08 Work Program project to develop a parallel package of key fiscal indicators for MCPS Capital Budget and Capital Improvements Program. Adaptations of the indicators study, as suggested by OLO, to measure the timing of the delivery of facilities included in the CIP, either by cluster or at the individual school level, would provide a more detailed picture of local and countywide conditions.

Annual Growth Policy: Draft School Test Options

March 29, 2007

Option #	Description	Test Elements				FY 2008 Results	Possible Variations
		Capacity Applied in Test	Borrowing	School Levels Tested	Geography Tested		
Option 1A	Current AGP Test	105% GP Cap. ES and MS 100% GP Cap. HS	At HS Level	ES, MS, HS	All Clusters	No Cluster Fails	Only test clusters at elementary level where most impact of new development occurs.
Option 1B	Current AGP Test @ 100%	100% GP Cap. ES, MS, and HS	At HS Level	ES, MS, HS	All Clusters	Clarksburg Fails at ES Level	Only test clusters at elementary level where most impact of new development occurs.
Option 1C	Current AGP Test @ 95%	95% GP Cap. ES, MS, and HS	At HS Level	ES, MS, HS	All Clusters	B-CC, Blake, Clarksburg, Kennedy, Northwest, Quince Orchard, and Springbrook fail at elementary level. Clarksburg fails at middle school level.	Only test clusters at elementary level where most impact of new development occurs.
Option 2A	MCPS Pgm Capacity @ 100%	100% MCPS Cap. ES, MS, and HS	None	ES, MS, HS	All Clusters	B-CC, Blake, Clarksburg, Einstein, Walter Johnson, Kennedy, Magruder, Richard Montgomery, Northwest, Northwood, Quince Orchard, Rockville, Sherwood, Wheaton and Whitman all fail at elementary level. Churchill and Clarksburg fail at middle school level. Blake and Wootton fail at high school	Only fail an area if ES, MS and HS levels all fail test. Only test clusters at elementary level where most impact of new development occurs.
Option 2B	MCPS Pgm Capacity @ 110%	110% MCPS Cap. ES, MS, and HS	None	ES, MS, HS	All Clusters	Blake, Clarksburg, Einstein, Kennedy, Northwest, and Wheaton fail at the elementary level. Clarksburg fails at middle school level. Wootton fails at high school level.	Only fail an area if ES, MS and HS levels all fail test. Only test clusters at elementary level where most impact of new development occurs.
Option 2C	MCPS Pgm Capacity @ 115%	115% MCPS Cap. ES, MS, and HS	None	ES, MS, HS	All Clusters	Blake, Einstein, Kennedy fail at elementary level. Clarksburg fails at middle school level. No failures at high school level.	Only test clusters at elementary level where most impact of new development occurs.
Option 3A	Current AGP Test	105% GP Cap. ES and MS 100% GP Cap. HS	At HS Level	ES, MS, HS	Clarksburg only	No failures at any level.	Only test clusters at elementary level where most impact of new development occurs.
Option 3B	Current AGP Test @ 100% All	100% GP Cap. ES, MS, and HS	At HS Level	ES, MS, HS	Clarksburg only	Clarksburg fails at elementary level.	Only test clusters at elementary level where most impact of new development occurs.
Optoin 3C	MCPS Pgm Capacity @ 110%	110% MCPS Cap. ES, MS, and HS	None	ES, MS, HS	Clarksburg only	Clarksburg fails at elementary and middle school levels.	Only test clusters at elementary level where most impact of new development occurs.

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Option 1A: Current AGP Test

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	3,023	2,753	-270
Blair	3,734	3,940	206
Blake	2,375	1,973	-402
Churchill	2,536	2,644	108
Clarksburg	3,586	3,153	-433
Damascus	2,513	2,429	-84
Einstein	2,235	1,758	-477
Gaithersburg	3,691	3,934	243
Walter Johnson	3,165	3,094	-71
Kennedy	2,355	1,798	-557
Magruder	2,545	2,523	-22
R. Montgomery	2,258	2,108	-150
Northwest	3,865	3,458	-407
Northwood	2,705	2,674	-31
Paint Branch	2,306	2,316	10
Poolesville	593	755	162
Quince Orchard	2,866	2,632	-234
Rockville	2,345	2,171	-174
Seneca Valley	2,098	2,187	89
Sherwood	2,506	2,464	-42
Springbrook	2,733	2,825	92
Watkins Mill	2,464	2,545	81
Wheaton	2,469	2,149	-320
Whitman	2,120	2,051	-69
Wootton	2,977	3,082	105

Growth Policy Test with Growth Policy (GP) Capacity

105% GP** Capacity With Council Amdended FY07-12 CIP	Growth Policy Test: Students Above or Below 105 % GP Cap.	Growth Policy Test Result - Capacity is:
3,258	235	Adequate
5,268	1,534	Adequate
2,539	164	Adequate
3,123	587	Adequate
3,677	91	Adequate
2,886	373	Adequate
2,838	603	Adequate
4,998	1,307	Adequate
3,507	342	Adequate
2,477	122	Adequate
3,416	871	Adequate
2,562	304	Adequate
4,249	384	Adequate
3,068	363	Adequate
2,778	472	Adequate
851	258	Adequate
3,159	293	Adequate
3,169	824	Adequate
2,752	654	Adequate
2,936	430	Adequate
3,757	1,024	Adequate
3,334	870	Adequate
2,956	487	Adequate
2,365	245	Adequate
3,425	448	Adequate

Middle School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	999	1,037	38
Blair	1,916	2,260	344
Blake	1,130	1,304	174
Churchill	1,347	1,336	-11
Clarksburg	1,340	1,146	-194
Damascus	919	937	18
Einstein	851	1,408	557
Gaithersburg	1,373	1,784	411
Walter Johnson	1,492	1,778	286
Kennedy	1,149	1,295	146
Magruder	1,135	1,611	476
R. Montgomery	965	973	8
Northwest	1,875	1,964	89
Northwood	1,013	1,308	295
Paint Branch	1,147	1,308	161
Poolesville	350	472	122
Quince Orchard	1,291	1,647	356
Rockville	828	972	144
Seneca Valley	1,182	1,408	226
Sherwood	1,244	1,475	231
Springbrook	1,046	1,165	119
Watkins Mill	1,075	1,200	125
Wheaton	1,399	1,570	171
Whitman	1,170	1,266	96
Wootton	1,443	1,493	50

Growth Policy Test with Growth Policy (GP) Capacity

105% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 105 % GP Cap.	Growth Policy Test Result - Capacity is:
1,181	182	Adequate
2,622	706	Adequate
1,536	406	Adequate
1,630	283	Adequate
1,465	125	Adequate
1,134	215	Adequate
1,796	945	Adequate
2,292	919	Adequate
2,244	752	Adequate
1,607	458	Adequate
1,890	755	Adequate
1,229	264	Adequate
2,339	464	Adequate
1,725	712	Adequate
1,536	389	Adequate
543	193	Adequate
1,914	623	Adequate
1,205	377	Adequate
1,701	519	Adequate
1,701	457	Adequate
1,488	442	Adequate
1,370	295	Adequate
2,032	633	Adequate
1,465	295	Adequate
1,748	305	Adequate

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

High School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	1,622	1,656	34
Blair	2,410	2,840	430
Blake	1,800	1,733	-67
Churchill	1,885	1,985	100
Clarksburg	1,479	1,629	150
Damascus	1,437	1,625	188
Einstein	1,556	1,602	46
Gaithersburg	2,035	2,126	91
Walter Johnson	2,068	2,131	63
Kennedy	1,422	1,705	283
Magruder	1,757	1,999	242
R. Montgomery	1,895	1,966	71
Northwest	2,146	2,214	68
Northwood	1,361	1,526	165
Paint Branch	1,697	2,148	451
Poolesville	1,065	1,094	29
Quince Orchard	1,743	1,809	66
Rockville	1,125	1,598	473
Seneca Valley	1,391	1,497	106
Sherwood	2,054	2,054	0
Springbrook	1,947	2,148	201
Watkins Mill	1,634	1,836	202
Wheaton	1,404	1,472	68
Whitman	1,815	1,909	94
Wootton	2,308	2,018	-290

Growth Policy Test with Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Borrowing Necessary?	Growth Policy Test Result - Capacity is:
1,710	88	no	Adequate
2,993	583	no	Adequate
1,778	-22	Paint Branch 396	Adequate
2,115	230	no	Adequate
1,643	164	no	Adequate
1,688	251	no	Adequate
1,800	244	no	Adequate
2,340	305	no	Adequate
2,363	295	no	Adequate
1,935	513	no	Adequate
2,115	358	no	Adequate
2,093	198	no	Adequate
2,295	149	no	Adequate
1,710	349	no	Adequate
2,093	396	no	Adequate
1,058	-7	Northwest 149	Adequate
1,980	237	no	Adequate
1,778	653	no	Adequate
1,665	274	no	Adequate
2,183	129	no	Adequate
2,273	326	no	Adequate
2,025	391	no	Adequate
1,643	239	no	Adequate
2,025	210	no	Adequate
2,183	-125	R. Montgomery 198	Adequate

Option 1B: Current AGP Test @ 100% GP Capacity All Levels

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	3,023	2,753	-270
Blair	3,734	3,940	206
Blake	2,375	1,973	-402
Churchill	2,536	2,644	108
Clarksburg	3,586	3,153	-433
Damascus	2,513	2,429	-84
Einstein	2,235	1,758	-477
Gaithersburg	3,691	3,934	243
Walter Johnson	3,165	3,094	-71
Kennedy	2,355	1,798	-557
Magruder	2,545	2,523	-22
R. Montgomery	2,258	2,108	-150
Northwest	3,865	3,458	-407
Northwood	2,705	2,674	-31
Paint Branch	2,306	2,316	10
Poolesville	593	755	162
Quince Orchard	2,866	2,632	-234
Rockville	2,345	2,171	-174
Seneca Valley	2,098	2,187	89
Sherwood	2,506	2,464	-42
Springbrook	2,733	2,825	92
Watkins Mill	2,464	2,545	81
Wheaton	2,469	2,149	-320
Whitman	2,120	2,051	-69
Wootton	2,977	3,082	105

Growth Policy Test with 100% Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Growth Policy Test Result - Capacity is:
3,103	80	Adequate
4,417	683	Adequate
2,418	43	Adequate
2,974	438	Adequate
3,502	**-84**	**Inadequate**
2,749	236	Adequate
2,703	468	Adequate
4,760	1,069	Adequate
3,340	175	Adequate
2,359	4	Adequate
3,253	708	Adequate
2,440	182	Adequate
4,047	182	Adequate
2,922	217	Adequate
2,646	340	Adequate
810	217	Adequate
3,009	143	Adequate
3,018	673	Adequate
2,621	523	Adequate
2,796	290	Adequate
2,646	-87	Adequate
3,175	711	Adequate
2,815	346	Adequate
2,252	132	Adequate
3,262	285	Adequate

Middle School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	999	1,037	38
Blair	1,916	2,260	344
Blake	1,130	1,304	174
Churchill	1,347	1,336	-11
Clarksburg	1,340	1,146	-194
Damascus	919	937	18
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Sherwood	1,244	1,475	231
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Watkins Mill	1,075	1,200	125
Wheaton	1,399	1,570	171
Whitman	1,170	1,266	96
Wootton	1,443	1,493	50

Growth Policy Test with 100% Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Growth Policy Test Result - Capacity is:
1,125	126	Adequate
2,498	582	Adequate
1,463	333	Adequate
1,553	206	Adequate
1,395	55	Adequate
1,080	161	Adequate
1,710	859	Adequate
2,183	810	Adequate
2,138	646	Adequate
1,530	381	Adequate
1,800	665	Adequate
1,170	205	Adequate
2,228	353	Adequate
1,643	630	Adequate
1,463	316	Adequate
518	168	Adequate
1,823	532	Adequate
1,148	320	Adequate
1,620	438	Adequate
1,620	376	Adequate
1,418	372	Adequate
1,305	230	Adequate
1,935	536	Adequate
1,395	225	Adequate
1,665	222	Adequate

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High School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
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1,643	164	no	Adequate
1,688	251	no	Adequate
1,800	244	no	Adequate
2,340	305	no	Adequate
2,363	295	no	Adequate
1,935	513	no	Adequate
2,115	358	no	Adequate
2,093	198	no	Adequate
2,295	149	no	Adequate
1,710	349	no	Adequate
2,093	396	no	Adequate
1,058	-7	Northwest 149	Adequate
1,980	237	no	Adequate
1,778	653	no	Adequate
1,665	274	no	Adequate
2,183	129	no	Adequate
2,273	326	no	Adequate
2,025	391	no	Adequate
1,643	239	no	Adequate
2,025	210	no	Adequate
2,183	-125	R. Montgomery 198	Adequate

Option 1C: Current AGP Test @ 95% GP Capacity All Levels

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity

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Clarksburg	3,586	3,153	-433
Damascus	2,513	2,429	-84
Einstein	2,235	1,758	-477
Gaithersburg	3,691	3,934	243
Walter Johnson	3,165	3,094	-71
Kennedy	2,355	1,798	-557
Magruder	2,545	2,523	-22
R. Montgomery	2,258	2,108	-150
Northwest	3,865	3,458	-407
Northwood	2,705	2,674	-31
Paint Branch	2,306	2,316	10
Poolesville	593	755	162
Quince Orchard	2,866	2,632	-234
Rockville	2,345	2,171	-174
Seneca Valley	2,098	2,187	89
Sherwood	2,506	2,464	-42
Springbrook	2,733	2,825	92
Watkins Mill	2,464	2,545	81
Wheaton	2,469	2,149	-320
Whitman	2,120	2,051	-69
Wootton	2,977	3,082	105

Growth Policy Test with 95% Growth Policy (GP) Capacity

95% GP** Capacity With Council Amdended FY07-12 CIP	Growth Policy Test: Students Above or Below 95 % GP Cap.	Growth Policy Test Result - Capacity is:
2,948	-75	**Inadequate**
4,196	462	Adequate
2,297	-78	**Inadequate**
2,825	289	Adequate
3,327	-259	**Inadequate**
2,612	99	Adequate
2,568	333	Adequate
4,522	831	Adequate
3,173	8	Adequate
2,241	-114	**Inadequate**
3,090	545	Adequate
2,318	60	Adequate
3,845	-20	**Inadequate**
2,776	71	Adequate
2,514	208	Adequate
770	177	Adequate
2,859	-7	**Inadequate**
2,867	522	Adequate
2,490	392	Adequate
2,656	150	Adequate
2,514	-219	**Inadequate**
3,016	552	Adequate
2,674	205	Adequate
2,139	19	Adequate
3,099	122	Adequate

Middle School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	999	1,037	38
Blair	1,916	2,260	344
Blake	1,130	1,304	174
Churchill	1,347	1,336	-11
Clarksburg	1,340	1,146	-194
Damascus	919	937	18
Einstein	851	1,408	557
Gaithersburg	1,373	1,784	411
Walter Johnson	1,492	1,778	286
Kennedy	1,149	1,295	146
Magruder	1,135	1,611	476
R. Montgomery	965	973	8
Northwest	1,875	1,964	89
Northwood	1,013	1,308	295
Paint Branch	1,147	1,308	161
Poolesville	350	472	122
Quince Orchard	1,291	1,647	356
Rockville	828	972	144
Seneca Valley	1,182	1,408	226
Sherwood	1,244	1,475	231
Springbrook	1,046	1,165	119
Watkins Mill	1,075	1,200	125
Wheaton	1,399	1,570	171
Whitman	1,170	1,266	96
Wootton	1,443	1,493	50

Growth Policy Test with 95% Growth Policy (GP) Capacity

95% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 95 % GP Cap.	Growth Policy Test Result - Capacity is:
1,069	70	Adequate
2,373	457	Adequate
1,390	260	Adequate
1,475	128	Adequate
1,325	-15	**Inadequate**
1,026	107	Adequate
1,625	774	Adequate
2,074	701	Adequate
2,031	539	Adequate
1,454	305	Adequate
1,710	575	Adequate
1,112	147	Adequate
2,117	242	Adequate
1,561	548	Adequate
1,390	243	Adequate
492	142	Adequate
1,732	441	Adequate
1,091	263	Adequate
1,539	357	Adequate
1,539	295	Adequate
1,347	301	Adequate
1,240	165	Adequate
1,838	439	Adequate
1,325	155	Adequate
1,665	222	Adequate

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

High School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
B- CC	1,622	1,656	34
Blair	2,410	2,840	430
Blake	1,800	1,733	-67
Churchill	1,885	1,985	100
Clarksburg	1,479	1,629	150
Damascus	1,437	1,625	188
Einstein	1,556	1,602	46
Gaithersburg	2,035	2,126	91
Walter Johnson	2,068	2,131	63
Kennedy	1,422	1,705	283
Magruder	1,757	1,999	242
R. Montgomery	1,895	1,966	71
Northwest	2,146	2,214	68
Northwood	1,361	1,526	165
Paint Branch	1,697	2,148	451
Poolesville	1,065	1,094	29
Quince Orchard	1,743	1,809	66
Rockville	1,125	1,598	473
Seneca Valley	1,391	1,497	106
Sherwood	2,054	2,054	0
Springbrook	1,947	2,148	201
Watkins Mill	1,634	1,836	202
Wheaton	1,404	1,472	68
Whitman	1,815	1,909	94
Wootton	2,308	2,018	-290

Growth Policy Test with 95% Growth Policy (GP) Capacity

95% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: *Students* Above or Below 95 % GP Cap.	Borrowing Necessary?	Growth Policy Test Result - Capacity is:
1,625	3	no	Adequate
2,843	433	no	Adequate
1,689	-111	Paint Branch 291	Adequate
2,009	124	no	Adequate
1,561	82	no	Adequate
1,604	167	no	Adequate
1,710	154	no	Adequate
2,223	188	no	Adequate
2,245	177	no	Adequate
1,838	416	no	Adequate
2,009	252	no	Adequate
1,988	93	no	Adequate
2,180	34	no	Adequate
1,625	264	no	Adequate
1,988	291	no	Adequate
1,005	-60	Clarksburg 82	Adequate
1,881	138	no	Adequate
1,689	564	no	Adequate
1,582	191	no	Adequate
2,074	20	no	Adequate
2,159	212	no	Adequate
1,924	290	no	Adequate
1,561	157	no	Adequate
1,924	109	no	Adequate
2,074	-234	Churchill 124 and Q.O. 138	Adequate

Option 2A: MCPS Program Capacity @ 100%

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity @ 100%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	3,023	2,753	**-270**	**Inadequate**
Blair	3,734	3,940	206	Adequate
Blake	2,375	1,973	**-402**	**Inadequate**
Churchill	2,536	2,644	108	Adequate
Clarksburg	3,586	3,153	**-433**	**Inadequate**
Damascus	2,513	2,429	**-84**	**Inadequate**
Einstein	2,235	1,758	**-477**	**Inadequate**
Gaithersburg	3,691	3,934	243	Adequate
Walter Johnson	3,165	3,094	**-71**	**Inadequate**
Kennedy	2,355	1,798	**-557**	**Inadequate**
Magruder	2,545	2,523	**-22**	**Inadequate**
R. Montgomery	2,258	2,108	**-150**	**Inadequate**
Northwest	3,865	3,458	**-407**	**Inadequate**
Northwood	2,705	2,674	-31	Inadequate
Paint Branch	2,306	2,316	10	Adequate
Poolesville	593	755	162	Adequate
Quince Orchard	2,866	2,632	**-234**	**Inadequate**
Rockville	2,345	2,171	**-174**	**Inadequate**
Seneca Valley	2,098	2,187	89	Adequate
Sherwood	2,506	2,464	**-42**	**Inadequate**
Springbrook	2,733	2,825	92	Adequate
Watkins Mill	2,464	2,545	81	Adequate
Wheaton	2,469	2,149	**-320**	**Inadequate**
Whitman	2,120	2,051	**-69**	**Inadequate**
Wootton	2,977	3,082	105	Adequate

Middle School Enrollment and MCPS Capacity @ 100%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	999	1,037	38	Adequate
Blair	1,916	2,260	344	Adequate
Blake	1,130	1,304	174	Adequate
Churchill	1,347	1,336	**-11**	**Inadequate**
Clarksburg	1,340	1,146	**-194**	**Inadequate**
Damascus	919	937	18	Adequate
Einstein	851	1,408	557	Adequate
Gaithersburg	1,373	1,784	411	Adequate
Walter Johnson	1,492	1,778	286	Adequate
Kennedy	1,149	1,295	146	Adequate
Magruder	1,135	1,611	476	Adequate
R. Montgomery	965	973	8	Adequate
Northwest	1,875	1,964	89	Adequate
Northwood	1,013	1,308	295	Adequate
Paint Branch	1,147	1,308	161	Adequate
Poolesville	350	472	122	Adequate
Quince Orchard	1,291	1,647	356	Adequate
Rockville	828	972	144	Adequate
Seneca Valley	1,182	1,408	226	Adequate
Sherwood	1,244	1,475	231	Adequate
Springbrook	1,046	1,165	119	Adequate
Watkins Mill	1,075	1,200	125	Adequate
Wheaton	1,399	1,570	171	Adequate
Whitman	1,170	1,266	96	Adequate
Wootton	1,443	1,493	50	Adequate

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

High School Enrollment and MCPS Capacity @ 100%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	1,622	1,656	34	Adequate
Blair	2,410	2,840	430	Adequate
Blake	1,800	1,733	**-67**	**Inadequate**
Churchill	1,885	1,985	100	Adequate
Clarksburg	1,479	1,629	150	Adequate
Damascus	1,437	1,625	188	Adequate
Einstein	1,556	1,602	46	Adequate
Gaithersburg	2,035	2,126	91	Adequate
Walter Johnson	2,068	2,131	63	Adequate
Kennedy	1,422	1,705	283	Adequate
Magruder	1,757	1,999	242	Adequate
R. Montgomery	1,895	1,966	71	Adequate
Northwest	2,146	2,214	68	Adequate
Northwood	1,361	1,526	165	Adequate
Paint Branch	1,697	2,148	451	Adequate
Poolesville	1,065	1,094	29	Adequate
Quince Orchard	1,743	1,809	66	Adequate
Rockville	1,125	1,598	473	Adequate
Seneca Valley	1,391	1,497	106	Adequate
Sherwood	2,054	2,054	0	Adequate
Springbrook	1,947	2,148	201	Adequate
Watkins Mill	1,634	1,836	202	Adequate
Wheaton	1,404	1,472	68	Adequate
Whitman	1,815	1,909	94	Adequate
Wootton	2,308	2,018	**-290**	**Inadequate**

Option 2B: MCPS Program Capacity @ 110%

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	3,023	2,753	3,028	5	Adequate
Blair	3,734	3,940	4,334	600	Adequate
Blake	2,375	1,973	2,170	-205	**Inadequate**
Churchill	2,536	2,644	2,908	372	Adequate
Clarksburg	3,586	3,153	3,468	-118	**Inadequate**
Damascus	2,513	2,429	2,672	159	Adequate
Einstein	2,235	1,758	1,934	-301	**Inadequate**
Gaithersburg	3,691	3,934	4,327	636	Adequate
Walter Johnson	3,165	3,094	3,403	238	Adequate
Kennedy	2,355	1,798	1,978	-377	**Inadequate**
Magruder	2,545	2,523	2,775	230	Adequate
R. Montgomery	2,258	2,108	2,319	61	Adequate
Northwest	3,865	3,458	3,804	-61	**Inadequate**
Northwood	2,705	2,674	2,941	236	Adequate
Paint Branch	2,306	2,316	2,548	242	Adequate
Poolesville	593	755	831	238	Adequate
Quince Orchard	2,866	2,632	2,895	29	Adequate
Rockville	2,345	2,171	2,388	43	Adequate
Seneca Valley	2,098	2,187	2,406	308	Adequate
Sherwood	2,506	2,464	2,710	204	Adequate
Springbrook	2,733	2,625	3,108	375	Adequate
Watkins Mill	2,464	2,545	2,800	336	Adequate
Wheaton	2,469	2,149	2,364	-105	**Inadequate**
Whitman	2,120	2,051	2,256	136	Adequate
Wootton	2,977	3,082	3,390	413	Adequate

Middle School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	999	1,037	1,141	142	Adequate
Blair	1,916	2,260	2,486	570	Adequate
Blake	1,130	1,304	1,434	304	Adequate
Churchill	1,347	1,336	1,470	123	Adequate
Clarksburg	1,340	1,146	1,261	-79	**Inadequate**
Damascus	919	937	1,031	112	Adequate
Einstein	851	1,408	1,549	698	Adequate
Gaithersburg	1,373	1,784	1,962	589	Adequate
Walter Johnson	1,492	1,778	1,956	464	Adequate
Kennedy	1,149	1,295	1,425	276	Adequate
Magruder	1,135	1,611	1,772	637	Adequate
R. Montgomery	965	973	1,070	105	Adequate
Northwest	1,875	1,964	2,160	285	Adequate
Northwood	1,013	1,308	1,439	426	Adequate
Paint Branch	1,147	1,308	1,439	292	Adequate
Poolesville	350	472	519	169	Adequate
Quince Orchard	1,291	1,647	1,812	521	Adequate
Rockville	828	972	1,069	241	Adequate
Seneca Valley	1,182	1,408	1,549	367	Adequate
Sherwood	1,244	1,475	1,623	379	Adequate
Springbrook	1,046	1,165	1,282	236	Adequate
Watkins Mill	1,075	1,200	1,320	245	Adequate
Wheaton	1,399	1,570	1,727	328	Adequate
Whitman	1,170	1,266	1,393	223	Adequate
Wootton	1,443	1,493	1,642	199	Adequate

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

High School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	1,622	1,656	1,822	200	Adequate
Blair	2,410	2,840	3,124	714	Adequate
Blake	1,800	1,733	1,906	106	Adequate
Churchill	1,885	1,985	2,184	299	Adequate
Clarksburg	1,479	1,629	1,792	313	Adequate
Damascus	1,437	1,625	1,788	351	Adequate
Einstein	1,556	1,602	1,762	206	Adequate
Gaithersburg	2,035	2,126	2,339	304	Adequate
Walter Johnson	2,068	2,131	2,344	276	Adequate
Kennedy	1,422	1,705	1,876	454	Adequate
Magruder	1,757	1,999	2,199	442	Adequate
R. Montgomery	1,895	1,966	2,163	268	Adequate
Northwest	2,146	2,214	2,435	289	Adequate
Northwood	1,361	1,526	1,679	318	Adequate
Paint Branch	1,697	2,148	2,363	666	Adequate
Poolesville	1,065	1,094	1,203	138	Adequate
Quince Orchard	1,743	1,809	1,990	247	Adequate
Rockville	1,125	1,598	1,758	633	Adequate
Seneca Valley	1,391	1,497	1,647	256	Adequate
Sherwood	2,054	2,054	2,259	205	Adequate
Springbrook	1,947	2,148	2,363	416	Adequate
Watkins Mill	1,634	1,836	2,020	386	Adequate
Wheaton	1,404	1,472	1,619	215	Adequate
Whitman	1,815	1,909	2,100	285	Adequate
Wootton	2,308	2,018	2,220	-88	**Inadequate**

Option 2C: MCPS Program Capacity @ 115%

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity @ 115%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	115% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	3,023	2,753	3,166	143	Adequate
Blair	3,734	3,940	4,531	797	Adequate
Blake	2,375	1,973	2,269	**-106**	**Inadequate**
Churchill	2,536	2,644	3,041	505	Adequate
Clarksburg	3,586	3,153	3,626	40	Adequate
Damascus	2,513	2,429	2,793	280	Adequate
Einstein	2,235	1,758	2,022	**-213**	**Inadequate**
Gaithersburg	3,691	3,934	4,524	833	Adequate
Walter Johnson	3,165	3,094	3,558	393	Adequate
Kennedy	2,355	1,798	2,068	**-287**	**Inadequate**
Magruder	2,545	2,523	2,901	356	Adequate
R. Montgomery	2,258	2,108	2,424	166	Adequate
Northwest	3,865	3,458	3,977	112	Adequate
Northwood	2,705	2,674	3,075	370	Adequate
Paint Branch	2,306	2,316	2,663	357	Adequate
Poolesville	593	755	868	275	Adequate
Quince Orchard	2,866	2,632	3,027	161	Adequate
Rockville	2,345	2,171	2,497	152	Adequate
Seneca Valley	2,098	2,187	2,515	417	Adequate
Sherwood	2,506	2,464	2,834	328	Adequate
Springbrook	2,733	2,825	3,249	516	Adequate
Watkins Mill	2,464	2,545	2,927	463	Adequate
Wheaton	2,469	2,149	2,471	2	Adequate
Whitman	2,120	2,051	2,359	239	Adequate
Wootton	2,977	3,082	3,544	567	Adequate

Middle School Enrollment and MCPS Capacity @ 115%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	115% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 115% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	999	1,037	1,193	194	Adequate
Blair	1,916	2,260	2,599	683	Adequate
Blake	1,130	1,304	1,500	370	Adequate
Churchill	1,347	1,336	1,536	189	Adequate
Clarksburg	1,340	1,146	1,318	**-22**	**Inadequate**
Damascus	919	937	1,078	159	Adequate
Einstein	851	1,408	1,619	768	Adequate
Gaithersburg	1,373	1,784	2,052	679	Adequate
Walter Johnson	1,492	1,778	2,045	553	Adequate
Kennedy	1,149	1,295	1,489	340	Adequate
Magruder	1,135	1,611	1,853	718	Adequate
R. Montgomery	965	973	1,119	154	Adequate
Northwest	1,875	1,964	2,259	384	Adequate
Northwood	1,013	1,308	1,504	491	Adequate
Paint Branch	1,147	1,308	1,504	357	Adequate
Poolesville	350	472	543	193	Adequate
Quince Orchard	1,291	1,647	1,894	603	Adequate
Rockville	828	972	1,118	290	Adequate
Seneca Valley	1,182	1,408	1,619	437	Adequate
Sherwood	1,244	1,475	1,696	452	Adequate
Springbrook	1,046	1,165	1,340	294	Adequate
Watkins Mill	1,075	1,200	1,380	305	Adequate
Wheaton	1,399	1,570	1,806	407	Adequate
Whitman	1,170	1,266	1,456	286	Adequate
Wootton	1,443	1,493	1,717	274	Adequate

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated proportionately to clusters.

High School Enrollment and MCPS Capacity @ 115%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	115% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 115% MCPS capacity	Growth Policy Test Result Capacity is:
B- CC	1,622	1,656	1,904	282	Adequate
Blair	2,410	2,840	3,266	856	Adequate
Blake	1,800	1,733	1,993	193	Adequate
Churchill	1,885	1,985	2,283	398	Adequate
Clarksburg	1,479	1,629	1,873	394	Adequate
Damascus	1,437	1,625	1,869	432	Adequate
Einstein	1,556	1,602	1,842	286	Adequate
Gaithersburg	2,035	2,126	2,445	410	Adequate
Walter Johnson	2,068	2,131	2,451	383	Adequate
Kennedy	1,422	1,705	1,961	539	Adequate
Magruder	1,757	1,999	2,299	542	Adequate
R. Montgomery	1,895	1,966	2,261	366	Adequate
Northwest	2,146	2,214	2,546	400	Adequate
Northwood	1,361	1,526	1,755	394	Adequate
Paint Branch	1,697	2,148	2,470	773	Adequate
Poolesville	1,065	1,094	1,258	193	Adequate
Quince Orchard	1,743	1,809	2,080	337	Adequate
Rockville	1,125	1,598	1,838	713	Adequate
Seneca Valley	1,391	1,497	1,722	331	Adequate
Sherwood	2,054	2,054	2,362	308	Adequate
Springbrook	1,947	2,148	2,470	523	Adequate
Watkins Mill	1,634	1,836	2,111	477	Adequate
Wheaton	1,404	1,472	1,693	289	Adequate
Whitman	1,815	1,909	2,195	380	Adequate
Wootton	2,308	2,018	2,321	13	Adequate

Option 3A: Current AGP Test

Test Only Clarksburg Cluster Where New Development is Primary Reason for Enrollment Increases

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	3,586	3,153	-433

Growth Policy Test with Growth Policy (GP) Capacity

105% GP** Capacity With Council Amdended FY07-12 CIP	Growth Policy Test: Students Above or Below 105 % GP Cap.	Growth Policy Test Result - Capacity is:
3,677	91	Adequate

Middle School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	1,340	1,146	-194

Growth Policy Test with Growth Policy (GP) Capacity

105% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 105 % GP Cap.	Growth Policy Test Result - Capacity is:
1,465	125	Adequate

High School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	1,479	1,629	150

Growth Policy Test with Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Borrowing Necessary?	Growth Policy Test Result - Capacity is:
1,643	164	no	Adequate

Option 3B: Current AGP Test @ 100% GP Capacity All Levels

Test Only Clarksburg Cluster Where New Development is Primary Reason for Enrollment Increases

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	3,586	3,153	-433

Growth Policy Test with 100% Growth Policy (GP) Capacity

100% GP** Capacity With Council Amdended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Growth Policy Test Result - Capacity is:
3,502	-84	**Inadequate**

Middle School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	1,340	1,146	-194

Growth Policy Test with 100% Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Growth Policy Test Result - Capacity is:
1,395	55	Adequate

High School Enrollment and MCPS Capacity

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 100% MCPS capacity
Clarksburg	1,479	1,629	150

Growth Policy Test with Growth Policy (GP) Capacity

100% GP** Capacity With Council Amended FY07-12 CIP	Growth Policy Test: Students Above or Below 100 % GP Cap.	Borrowing Necessary?	Growth Policy Test Result - Capacity is:
1,643	164	no	Adequate

Option 3C: MCPS Program Capacity @ 110%

Test Only Clarksburg Cluster Where New Development is Primary Reason for Enrollment Increases

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
Clarksburg	3,586	3,153	3,468	**-118**	**Inadequate**

Middle School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
Clarksburg	1,340	1,146	1,261	**-79**	**Inadequate**

High School Enrollment and MCPS Capacity @ 110%

Cluster Area	Projected Sept. 2012 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	110% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining @ 110% MCPS capacity	Growth Policy Test Result Capacity is:
Clarksburg	1,479	1,629	1,792	313	Adequate

Responses to School Test Questions

- **MNCBIA Testimony**
- **Additional Questions from Councilmember Praisner**

MNCBIA testimony (Rick Sullivan)

1. *"MCPS statistics show that 90% of new school enrollment comes from existing neighborhoods but the proposal places the burden for that 90% on new homes."*

   Response: Two main sources of new school enrollment are students from new homes and students from the turnover of existing homes. The Planning Board's proposal carefully and accurately proportions the suggested contribution from each source (new and existing) based on their student generation rates.

   The comments from MNCBIA suggest that new homes contribute more towards schools than existing homes/residents do. This is not true. In 2006, impact tax revenues for schools totaled $6.9 million while the portion of recordation taxes for schools totaled $44 million. The Planning Board recommends increasing revenues from both sources, but impact taxes revenues would still be much less than total recordation tax revenues.

   In fact, while the Planning Board is recommending that the school impact tax increase by up to 250%, the Board is recommending that the recordation tax devoted to schools increase by more than 400%.

   Montgomery County Public School (MCPS) enrollment has grown in established areas of the county as well as in developing areas of the county. Although it is difficult to say exactly how much enrollment growth is due to turnover of existing homes versus sale of new homes, it is generally the case that the sale of either type of home (existing or new) results in occupancy by young households with the potential for school-age children. However, on average, a new home has a much higher student generation rate than does the turnover of an existing home.

   While new homes generate more students on a per-unit basis, the number of new homes is much smaller than the turnovers of existing homes.

   To approximate the amount of enrollment growth attributable to turnover versus sale of new homes, MCPS has calculated the percent of total housing sales each year that are resales, compared to new home completions. For example, in 2005 there were a total of 22,763 resales recorded and 3,700 new unit completions. Therefore, of the total of 26,463 units put on the market 86% were turnover units and 14% were new units. As the housing market cooled in 2006, there were 15,881 resales recorded and 3,451 new unit completions. Therefore, of the total of 19,332 units put on the market 82% were turnover units and 18% were new units. While these figures vary from year to year, the magnitude of the existing base of single family detached and

attached housing units creates a much larger number of resales each year than new home completions. Therefore, the turnover of existing housing generates more enrollment than new home sales.

Because *new* homes generate *more* students on a *per unit* basis, the Planning Board is recommending that the *per unit* tax on *new* homes be *larger*. Because turnover of *existing* homes generates *fewer* students on a *per unit* basis, the Planning Board is recommending that the *per unit* recordation tax on the turnover of *existing* homes be *lower*.

2. **MNCBIA:** *"MNCPPC projected that we would produce 27,000 homes in the next 6 years or 4,500 units a year, yet we are building roughly 3,000 homes units a year and that number continues to decline in the wake of a slow housing market, etc."*

   Response: As shown in the table below, the number of new housing units completed in the past 5 years has averaged about 4,500 (4,474). MNCPPC forecasts in 5 year increments and do not try to forecast individual years. However, at the spring ULI conference, a roundtable of local housing economists forecast a recovery of the local housing market by year's end. Staff notes that while home sales have slowed considerably, home prices have continued to increase, albeit much more slowly than in the past.

Year	Units Built
2002	5,484
2003	5,461
2004	4,274
2005	3,700
2006	3,451
Avg	4,474

3. **MNCBIA:** *"Park and Planning based its school impact tax on the project costs of 28.7 new schools while Master Plans call for 25..."*

   Response: The Planning Board's recommendation is not based on the number of planned schools, but on the *average cost per pupil* to construct an elementary, middle, or high school. It then apportions these costs to different housing types based on their student generation rate.

   To develop the proposed impact tax rates, the current costs of building elementary, middle, and high schools was provided to Planning Board staff by MCPS. These construction costs were divided by the capacity of these facilities to obtain a per pupil cost of construction. These costs are $32,524 per elementary school student, $42,351 per middle school student, and $47,501 per high school student. These costs were then converted to housing unit costs, based on the County average student generation

rates for various housing types. From these calculations the following housing unit impact tax rates were derived: $22,729 per single-family detached unit, $17,112 per single-family attached unit, $10,815 per multi-family garden apartment unit, and $4,585 per mid and high-rise units.

The Planning Board report considered three methods for setting impact tax rates, the one described above that was the basis of the proposed rates, and two others that used household and student forecasts for 2012 or 2030. In the end, these other methods were not considered as appropriate as the method chosen.

4. **MNCBIA:** *"Park and Planning concluded that buyers of new homes will generate new students who can only be accommodated in new schools despite the fact that MCPS enrollment has leveled off."*

   Response: MCPS enrollment has leveled off temporarily, but long-range increases in enrollment are expected to resume. It is true that in some cases the impact of new housing can be absorbed in existing schools without the need for new school construction, or the construction of additions on existing schools. However, as long as a new subdivision generates student enrollment it does have an impact on school facilities—either in the short term if no space is available, or in the long-term when enrollment may exceed capacity.

5. **MNCBIA:** *"Both MCPS and Park and Planning note that a major factor in school capacity, which relates to the use of relocatable classrooms, comes not from growth but reductions in class size due to changes in various school programs and policies."*

   Response: For over 20 years in MCPS new school construction has competed with the need to modernize older schools. Although enrollment has leveled off in recent years, this competition continues as MCPS strives to address the backlog of capacity projects needed to reduce the number of relocatables at schools. Although the number of new schools in the six-year program is less than in the past, there continue to be many additions planned to existing schools.

   Class-size reductions at MCPS schools, particularly in areas with high levels of participation in the Free and Reduced-Price Meals System program (FARMS), have required additional capacity be built. This is an instance where the need for school construction is not attributable to housing turnover or new home construction. However, since the proposed school impact taxes are calculated for the "marginal cost" of a new development—in terms of the number of students generated—these charges are not paying for the impact of class-size reductions and other program initiatives at a school.

6. **MNCBIA:** *"The recommended School Impact Tax covers the full cost of new facilities, relying on the unsubstantiated premise that "new development" will be generating new students where there are no facilities, despite P & P's findings that as Montgomery County is approaching buildout with fewer large greenfield development projects on the horizon, most new projects will be relatively small in scale and will be spread throughout the County at various infill and redevelopment sites."*

   Response: The proposed school impact taxes are calculated at the full marginal cost of each student generated—in terms of the per student cost of school construction. This is not the same as paying the full cost of new facilities. Even at the rates proposed by the Planning Board, school impact taxes will contribute only a small portion of the total cost of new facilities. Although less "greenfields" development will occur, the addition of students in more established areas of the county still requires adequate MCPS facilities. Impact taxes help fund the costs of ensuring adequate schools in all parts of the county.

7. **MNCBIA**: *"The basic student generation rate MNCPPC used for their calculation is wrong: it used the Upcounty Student Generation rate across the entire County..."*

   Response: This is not correct. The Planning Board used countywide student generation rates, not upcounty rates, in their calculation of school impact taxes (and the school facilities payment).

Responses to Councilmember Praisner's questions

1. **Councilmember Praisner: Could you further explain how consortiums are handled by the school test?**

   Response: In the current and proposed school test there are 25 geographic areas tested. These areas correspond to MCPS clusters. In the case of the two high school consortiums (Downcounty and Northeast consortiums) these larger areas are disaggregated to their cluster components. In the consortiums these cluster areas correspond to the base areas of the high schools. This means that the Downcounty Consortium is disaggregated to the Blair, Einstein, Kennedy, Northwood, and Wheaton clusters, and the Northeast Consortium is disaggregated to the Blake, Paint Branch, and Springbrook clusters. This ensures that all 25 areas used in the school test are comparable.

2. **Councilmember Praisner: How do you account for the fact that students in high school have many options that mean that they are not "in school" all day, every day?**

Response: In the current and proposed school test all high school students who are enrolled at a school are included in the comparison of enrollment and capacity. Although a number of high school students may leave their school for internships, or other purposes, for a portion of the day, this does not free up capacity in the schools. This is the case since at some point in the school day all students enrolled at the school will be present and this is the enrollment level that must be accommodated by the facility.

3. **Councilmember Praisner: How do you account for paired elementary schools?**

   Response: Since the current and proposed school test aggregate all elementary school enrollment and capacity in each cluster, there is no unique issue presented by paired schools. Like other elementary schools, their enrollment and capacity is simply subsumed in the cluster total enrollment and total capacity used for the school test.

4. **Councilmember Praisner: How do you avoid the argument that a developer may make whose project is affected by a changing capacity number from when the previous development was approved and by the fact that the state may have contributed to the funding of the school when it had a larger capacity?**

   Response: Directly addressing the proposed shift from growth policy capacity to program capacity: Part of the response would be that tightening or loosening APF standards periodically is valid as long as public officials have ample justification and are not acting arbitrarily. Moving from Growth Policy capacity to program capacity is not a move to an arbitrary standard; in fact, it is a move to a more detailed and already-existing definition, each aspect of which has been carefully considered before being adopted.

   Over capacity schools that are partially state funded are analogous to over-capacity state roads. In both cases, it is fair to ask developers to wait until adequacy is restored or make a contribution toward restoring adequacy.

   Your question may also relate to what happens if program capacity is adopted as the definition of capacity, and MCPS decisions change program capacity for a cluster. To address the issue of potential changes in program capacity, MCPS has proposed that the County Council adopt cluster capacities on a biennial basis for growth policy purposes. This would enable these figures to be held constant and avoid developer concerns that a change in program capacity altered the outcome of the school test from one year to the next.

5. **Councilmember Praisner: Why is 135% an appropriate trigger; i.e., why not 130% or 140%?**

   Response: The Planning Board has proposed that enrollment above 135% of MCPS program capacity be the threshold for triggering a building moratorium in a cluster. This approximately corresponds with the percent level used in the current school test

to trigger a moratorium, at 110% of the current growth policy capacity. In addition, the Planning Board proposal creates a two-stage school test. When projected enrollment is above 110% of program capacity a developer must pay a school facility payment, or the subdivision plan will not be approved. This allows the county to either collect the marginal facility cost of a new subdivision, or to stop the development. Also, in selecting the use of 135% of program capacity to impose a moratorium, the Planning Board sought a level where space deficits were so severe that this serious action was clearly justified.
There are no major technical underpinnings that point to a 135% figure instead of a similar figure. The 135% figure reflects the position of the Board related to the effectiveness of moratoria on slowing school enrollment growth and should also be taken in context with the Board's proposal for substantially increases revenues available to add school capacity.

6. **Councilmember Praisner: On page 50, what does "inflated" mean?**

   Response: On page 50 of the Planning Board report it is recommended that MCPS program capacity figures be "inflated" to avoid past concerns over their use in the school test. This means that some higher percent of program capacity needs to be used. As indicated in the previous response, this "inflated" value is 110% of program capacity for imposition of school facilities payments, and 135% for imposition of development moratorium.

7. **Councilmember Praisner: If you expand the role of this test with the CIP, does that affect MCPS's ability to request changes?**

   Response: The Planning Board's recommendation to link growth policy and CIP decisions should not affect the ability of MCPS to request changes to capital projects, as long as MCPS program capacity is used. The results of the school test will verify the areas of the county with space issues that need to be addressed in the CIP. In areas of the county that pass the 110% and 135% school test thresholds, the growth policy will assist MCPS in justifying the need for capacity projects in these areas—in order to avoid the imposition of school facility payments or moratoria.

The group should deliver a report on measures of effectiveness by June 2008, including measures to encourage and support changes in individual transportation choices that reduce the number of trips in prime commuting times; recommendations on performance standards by September 2008; and recommendations on mitigation approaches by March 2009.

- The Board's objective is to continue to make progress in our transition from tests that measure how well a facility operates toward tests that measure the experiences of all users of the transportation network.
- The Board supports the recommendation to work with independent consultants but notes that doing so will have budgetary implications that the Board will explore with the Council during the Semi-Annual Report.

9. **The Growth Policy Resolution should require a School Facilities Payment when enrollment in enrollment exceeds 110 percent of MCPS Program Capacity, and prohibit development when enrollment exceeds 135 percent of MCPS Program Capacity.**
    - The current definitions of capacity in the Growth Policy do not reflect the practical fact that classroom capacity can vary based on how the classroom is used, and moreover, the fact that classrooms used for the same purpose may have a different capacity from cluster to cluster. Basing the school test on MCPS program capacity addresses this issue.
    - The move to program capacity results in a tighter test than currently used. The Board recommends requiring the School facilities Payment at 110 percent of MCPS program capacity to reflect the fact that there is judgment involved in both the enrollment forecasts and the assignment of programs to classrooms.
    - The Board's recommendation that moratoria be imposed when enrollment exceeds 135 percent of capacity reflects the Board's finding that new development is often not the major contributor to school enrollment change.
10. **The School Facilities Payment should equal the County cost per-pupil of school infrastructure.**
    - The School Facilities Payment is a useful tool to help prevent clusters from becoming unacceptably crowded. In order to perform that function, the payments should be commensurate with the cost of constructing school infrastructure.

Measures of School Adequacy

The Growth Policy currently has a two-tiered test for school adequacy. When forecast enrollment for a high school exceeds 100 percent of forecast capacity for that high school; or forecast enrollment for elementary or middle schools in a cluster exceeds 105 percent of the capacity for those schools in that cluster, the Planning Board may approve residential development in that cluster but only if the developer agrees to contribute financially to new school facilities (a "school facilities payment"). If forecast enrollment at any level exceeds 100 percent of capacity, then the cluster is closed to new residential subdivision approvals (except senior housing) for that fiscal year.

Almost every aspect of the school adequacy test was evaluated by the Planning Board in its *Final Draft 2007-2009 Growth Policy*. The discussion begins on page 59. The Planning Board recommended:

- Using the same definition of capacity in the Growth Policy as is used by Montgomery County Public Schools for facility planning (aka, "program capacity").
- Retaining the two-tiered test that first triggers a school facilities payment when enrollment exceeds 110 percent of capacity, and a moratorium when enrollment exceeds capacity by 135 percent. Although neither threshold is a "magic number," they were selected by the Planning Board after an in-depth review of the factors that affect school enrollment change.
- Setting the school facilities payment equal to the cost-per-pupil of school infrastructure, which is $32,524 for each elementary school student, $42,351 for each middle school student, and $47,501 for each high school student.

The numbers underpinning the Planning Board recommendations are shown in tables on the next page.

The result of the Planning Board's recommendations is that the school facilities payment would be required at the high school level by development in the Wootton cluster; at the middle school level by development in the Clarksburg cluster; and at the elementary school level in the Blake, Clarksburg, Einstein, Kennedy, Northwest and Wheaton clusters.

County Executive Isiah Leggett's Growth Policy recommendations contain one difference from the Planning Board's school adequacy test recommendations. The Executive would impose the school facilities payment at a lower threshold: 100 percent of program capacity. The Executive's recommendations would impose the school facilities payment in two additional

clusters at the high school level; one additional cluster at the middle school level, and nine additional clusters at the elementary school level.

Numbers Related to the Planning Board's School Facilities Payment Recommendations

Marginal Costs of Growth[1]	Elementary	Middle	High
Cost per pupil	$32,524	$42,351	$47,501

Student Generation Factors[2]	Elementary	Middle	High
Housing Type			
SFD (single family detached)	0.320	0.144	0.131
SFA (single family attached)	0.211	0.122	0.107
Multi-family garden apt.	0.153	0.056	0.073
High/Low Rise w/parking	0.042	0.039	0.033

Cost per Housing Type	Elementary	Middle	High	Total
SFD (single family detached)	$10,408	$6,099	$6,223	$22,729
SFA (single family attached)	$6,863	$5,167	$5,083	$17,112
Multi-family garden apt	$4,976	$2,372	$3,468	$10,815
High/Low Rise w/parking	$1,366	$1,652	$1,568	$4,585

Council Issues with the School Adequacy Test

The County Council is considering several options for the school adequacy test in addition to those recommended by the Planning Board and the County Executive. The Council has not yet selected a threshold for triggering the school facilities payment or a subdivision moratorium. Among the options raised by Councilmembers: a 100 percent threshold for the school facilities payment and a 110 percent threshold for imposing a moratorium.

Councilmembers also asked for the results of the school adequacy test if the forecast horizon were changed from 5 years (the current approach) to four years. This change would mean that the test would forecast enrollment four years into the future and compare it with school capacity anticipated to be available four years from now. MCPS has recalculated the enrollment and capacity numbers for a four year test and the results are shown in a following

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[1] *Source: MCPS*

[2] *Source: MNCPPC Census Update Survey*

table entitled "Capacity Remaining Under Various Thresholds for School Test Using MCPS Program Capacity and Four Year Threshold."

Council staff proposed more substantial changes to the current test: calculating "staging ceilings" based on school capacity and eliminating the school facilities payment in favor of a "ceiling flexibility" provision. This second idea would eliminate the two-tier nature of the school adequacy test – a cluster would either be "adequate" and new approvals could continue, or the cluster would be "inadequate" and approvals would stop unless the developer built the school facilities needed by his development (a qualitatively different idea from having the developer contribute funds toward school capacity).

"Staging ceilings" have been used with the Growth Policy's policy area transportation test for many years. Setting staging ceilings for schools is a relatively simple matter: the amount of remaining capacity for new students in each cluster is equal to the *forecast capacity* minus *the forecast enrollment*. In the previous table entitled "Capacity Remaining Under Various Thresholds for School Test Using MCPS Program Capacity and Four Year Threshold," Planning staff shows the remaining capacity for new students under various definitions of adequacy.

Planning staff notes that "net remaining capacities" under the old transportation staging ceilings were based on transportation demand from *existing development* plus the entire *pipeline of approved development*. This is different from what is proposed for the school ceilings, which would be forecast enrollment. MCPS has expressed concern about using forecasts as the basis for staging ceilings, as the forecasts are already hotly debated and this would give them even greater importance.

When the Montgomery County School Board supported the Planning Board's recommendations, it noted that a concern about "program capacity" is that it can change from year to year to a much greater extent than the current definition of "Growth Policy capacity." The School Board proposed handling this problem by freezing program capacity of a school over the two-year Growth Policy cycle. This would mean that if a program were moved from one school to another during the Growth Policy cycle, it would not trigger a change in the school adequacy test results until the next Growth Policy was adopted. Planning staff supports this idea.

Planning Staff Response

With the exception of the School Board proposal to freeze program capacity over the life of the Growth Policy, Planning staff is not recommending that the Planning Board change its recommendations for the school adequacy test.

The Planning Board decided to recommend switching to "program capacity" to better reflect how capacity is experienced by students and how capacity is defined for school planning purposes. "Program capacity" is smaller than the current "Growth Policy capacity." A historical concern about using "program capacity" is that the results vary depending on many small decisions not directly related to infrastructure. That is one of the reasons that Planning staff recommended that the threshold for the school facilities payment be 110 percent instead of 100 percent – the payment would not be triggered by a programming decision that just barely lifts enrollment over capacity in a cluster.

The Planning Board studied the factors affecting school enrollment change – particularly the role that new development plays compared to other sources of change. The Planning Board's recommendation that the school facilities payment be triggered at 110 percent of capacity and the moratorium triggered at 135 percent of capacity reflects a finding that new development is often not the major source of school enrollment change.

Planning staff is not recommending that the school adequacy test be based on a four-year forecast of enrollment and capacity, although we do not feel strongly about this issue. Staff notes that the four-year test and the five-year test have the same seven clusters paying the school facilities payment, and no cluster would be over 135 percent of capacity, so no cluster would be in moratorium. A rationale for moving to a four-year test is if school facilities fully funded in the first five years of a CIP do not result in school facilities being completed five years later. That is, have programmed school facilities, once counted for the Growth Policy, been delayed? A review of past school construction by Council staff suggests that school projects, one fully funded in the CIP, do move reliably to completion.

Planning staff is not recommending the use of staging ceilings for schools. Staff notes that we did not recommend the return of staging ceilings for the transportation test, either. Our rationale is that staging ceilings add considerable uncertainty and complexity to the adequate public facilities test. That added uncertainty and complexity is not justified by the added public benefit because the relationship of new development and facility adequacy is not precise.

Planning staff has a warmer reaction to the idea of requiring developers in clusters that are inadequate to build the school facilities needed by their development project. We don't agree with Council staff's rationale[3] but we agree that there is a closer nexus between *impact* and *remedy* if the developer is required to make an improvement that mitigates the impact of his development project. We are not recommending adoption of this approach because Planning staff is trying to move away from a system where developers contribute little toward infrastructure as long as facilities are "adequate" but as *soon* as the line is crossed into "inadequate" status, new development must mitigate 100 percent of its impact (or even more than 100 percent, in some cases).

The two-tiered school test has two different levels of requirements on developers, pending on the degree of inadequacy. Staff thinks that approach makes sense for a County at this stage in its development, and we are applying the idea in our revised recommendations for PAMR as well.

Having some clusters in "school facilities payment" status also signals the public sector that it is time to allocate more resources to that cluster. This is another way that the school facilities payment serves a traditional APFO function.

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[3] Council staff suggested that the use of a school facilities payment runs counter to the principle of an adequate public facilities ordinance. Planning staff does not agree, in part because of the likelihood that school facilities payments will result in the construction of the needed facilities, and in part because the school facilities payment is backed up by a moratorium if conditions worsen.

Capacity Remaining Under Various Thresholds for School Test - Elementary Schools

Using MCPS Program Capacity and Four Year Threshold

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS Program Capacity			Capacity Remaining (in Students)				
Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	100% Capacity Remaining at 100% of MCPS Capacity	110% Capacity Remaining at 110% of MCPS Capacity	120% Capacity Remaining at 120% of MCPS Capacity	130% Capacity Remaining at 130% of MCPS Capacity	135% Capacity Remaining at 135% of MCPS Capacity
B- CC	3,003	2,761	-242	34	310	586	724
Blair	3,619	3,933	314	707	1,101	1,494	1,691
Blake	2,347	2,000	-347	-147	53	253	353
Churchill	2,564	2,644	80	344	609	873	1,005
Clarksburg	3,236	3,009	-227	74	375	676	826
Damascus	1,949	2,106	157	368	578	789	894
Einstein	2,221	1,758	-463	-287	-111	64	152
Gaithersburg	3,637	3,947	310	705	1,099	1,494	1,691
Walter Johnson	3,126	3,094	-32	277	587	896	1,051
Kennedy	2,288	1,798	-490	-310	-130	49	139
Magruder	2,485	2,536	51	305	558	812	939
R. Montgomery	2,232	2,153	-79	136	352	567	675
Northwest	3,872	3,475	-397	-49	298	646	819
Northwood	2,695	2,642	-53	211	475	740	872
Paint Branch	2,277	2,337	60	294	527	761	878
Poolesville	585	755	170	246	321	397	434
Quince Orchard	2,852	2,652	-200	65	330	596	728
Rockville	2,341	2,172	-169	48	265	483	591
Seneca Valley	2,062	2,202	140	360	580	801	911
Sherwood	2,471	2,464	-7	239	486	732	855
Springbrook	2,658	2,845	187	472	756	1,041	1,183
Watkins Mill	2,430	2,545	115	370	624	879	1,006
Wheaton	2,442	2,149	-293	-78	137	352	459
Whitman	2,122	2,084	-38	170	379	587	691
Wootton	2,963	3,082	119	427	735	1,044	1,198

(34)

* MCPS program capacity based on a variety of classroom capacities based on programs in the school, including variations for class-size reduction schools, and Pre-K/ Head Start, ESOL, and Special education programs (as published in November in the CIP and in June in the Master Plan.)

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated porportionately to applicable clusters.

Enrollment projections by Montgomery County Public Schools, October, 2006.

Capacity Remaining Under Various Thresholds for School Test - Middle Schools

Using MCPS Program Capacity and Four Year Threshold

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Middle School Enrollment and MCPS Program Capacity

Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining (in Students) 100% Capacity Remaining at 100% of MCPS Capacity	110% Capacity Remaining at 110% of MCPS Capacity	120% Capacity Remaining at 120% of MCPS Capacity	130% Capacity Remaining at 130% of MCPS Capacity	135% Capacity Remaining at 135% of MCPS Capacity
B- CC	1,000	1,037	37	141	244	348	400
Blair	1,878	2,247	369	594	818	1,043	1,155
Blake	1,147	1,332	185	318	451	585	651
Churchill	1,323	1,426	103	246	388	531	602
Clarksburg	1,275	1,146	-129	-14	100	215	272
Damascus	910	937	27	121	214	308	355
Einstein	851	1,430	579	722	865	1,008	1,080
Gaithersburg	1,381	1,800	419	599	779	959	1,049
Walter Johnson	1,477	1,855	378	564	749	935	1,027
Kennedy	1,167	1,333	166	299	433	566	633
Magruder	1,192	1,656	464	630	795	961	1,044
R. Montgomery	991	973	-18	79	177	274	323
Northwest	1,808	1,971	163	360	557	754	853
Northwood	847	1,339	492	626	760	894	961
Paint Branch	1,189	1,308	119	250	381	511	577
Poolesville	371	472	101	148	195	243	266
Quince Orchard	1,252	1,532	280	433	586	740	816
Rockville	817	972	155	252	349	447	495
Seneca Valley	1,199	1,468	269	416	563	709	783
Sherwood	1,272	1,475	203	351	498	646	719
Springbrook	1,046	1,215	169	291	412	534	594
Watkins Mill	1,090	1,260	170	296	422	548	611
Wheaton	1,398	1,570	172	329	486	643	722
Whitman	1,186	1,267	81	208	334	461	524
Wootton	1,456	1,583	127	285	444	602	681

(35)

* MCPS program capacity based on a variety of classroom capacities based on programs in the school, including variations for class-size reduction schools, and Pre-K/ Head Start, ESOL, and Special education programs (as published in November in the CIP and in June in the Master Plan.)

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated porportionately to applicable clusters.

Enrollment projections by Montgomery County Public Schools, October, 2006.

Capacity Remaining Under Various Thresholds for School Test - High Schools

Using MCPS Program Capacity and Four Year Threshold

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

High School Enrollment and MCPS Program Capacity			Capacity Remaining (In Students)				
Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	**100%** Capacity Remaining at 100% of MCPS Capacity	**110%** Capacity Remaining at 110% of MCPS Capacity	**120%** Capacity Remaining at 120% of MCPS Capacity	**130%** Capacity Remaining at 130% of MCPS Capacity	**135%** Capacity Remaining at 135% of MCPS Capacity
B- CC	1,628	1,656	28	194	359	525	608
Blair	2,469	2,840	371	655	939	1,223	1,365
Blake	1,798	1,715	-83	89	260	432	517
Churchill	1,969	1,985	16	215	413	612	711
Clarksburg	1,462	1,629	167	330	493	656	737
Damascus	1,384	1,625	241	404	566	729	810
Einstein	1,545	1,575	30	188	345	503	581
Gaithersburg	1,981	2,094	113	322	532	741	846
Walter Johnson	2,030	2,199	169	389	609	829	939
Kennedy	1,405	1,718	313	485	657	828	914
Magruder	1,757	1,954	197	392	588	783	881
R. Montgomery	1,883	1,967	84	281	477	674	772
Northwest	2,100	2,187	87	306	524	743	852
Northwood	1,297	1,526	229	382	534	687	763
Paint Branch	1,665	1,899	234	424	614	804	899
Poolesville	1,063	1,094	31	140	250	359	414
Quince Orchard	1,759	1,791	32	211	390	569	659
Rockville	1,106	1,585	479	638	796	955	1,034
Seneca Valley	1,367	1,497	130	280	429	579	654
Sherwood	2,059	2,054	-5	200	406	611	714
Springbrook	1,915	2,148	233	448	663	877	985
Watkins Mill	1,623	1,890	267	456	645	834	929
Wheaton	1,385	1,472	87	234	381	529	602
Whitman	1,853	1,909	56	247	438	629	724
Wootton	2,326	2,031	-295	-92	111	314	416

* MCPS program capacity based on a variety of classroom capacities based on programs in the school, including variations for class-size reduction schools, and Pre-K/ Head Start, ESOL, and Special education programs (as published in November in the CIP and in June in the Master Plan.)

In cases where elementary or middle schools articulate to more than one high school, enrollments and capacities are allocated porportionately to applicable clusters.

Enrollment projections by Montgomery County Public Schools, October, 2006.

Capacity Remaining Under Various Thresholds for School Test

Using MCPS Program Capacity and Four Year Threshold

Reflects Amended FY 2007-2012 Capital Improvements Program (CIP) and MCPS Enrollment Forecast

Elementary School Enrollment and MCPS ProgramCapacity

Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining (in Students) 100% Capacity Remaining at 100% of MCPS Capacity	110% Capacity Remaining at 110% of MCPS Capacity	115% Capacity Remaining at 115% of MCPS Capacity	120% Capacity Remaining at 120% of MCPS Capacity	135% Capacity Remaining at 135% of MCPS Capacity
B- CC	3,003	2,761	-242	34	172	310	724
Blair	3,619	3,933	314	707	904	1,101	1,691
Blake	2,347	2,000	-347	-147	-47	53	353
Churchill	2,564	2,644	80	344	477	609	1,005
Clarksburg	3,236	3,009	-227	74	224	375	826
Damascus	1,949	2,106	157	368	473	578	894
Einstein	2,221	1,758	-463	-287	-199	-111	152
Gaithersburg	3,637	3,947	310	705	902	1,099	1,691
Walter Johnson	3,126	3,094	-32	277	432	587	1,051
Kennedy	2,288	1,798	-490	-310	-220	-130	139
Magruder	2,485	2,536	51	305	431	558	939
R. Montgomery	2,232	2,153	-79	136	244	352	675
Northwest	3,872	3,475	-397	-49	124	298	819
Northwood	2,695	2,642	-53	211	343	475	872
Paint Branch	2,277	2,337	60	294	411	527	878
Poolesville	585	755	170	246	283	321	434
Quince Orchard	2,852	2,652	-200	65	198	330	728
Rockville	2,341	2,172	-169	48	157	265	591
Seneca Valley	2,062	2,202	140	360	470	580	911
Sherwood	2,471	2,464	-7	239	363	486	855
Springbrook	2,658	2,845	187	472	614	756	1,183
Watkins Mill	2,430	2,545	115	370	497	624	1,006
Wheaton	2,442	2,149	-293	-78	29	137	459
Whitman	2,122	2,084	-38	170	275	379	691
Wootton	2,963	3,082	119	427	581	735	1,198

Middle School Enrollment and MCPS ProgramCapacity

Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining (in Stu city Remaining (in Students) 100% Capacity Remaining at 100% of MCPS Capacity	110% Capacity Remaining at 110% of MCPS Capacity	115% Capacity Remaining at 115% of MCPS Capacity	120% Capacity Remaining at 120% of MCPS Capacity	135% Capacity Remaining at 135% of MCPS Capacity
B- CC	1,000	1,037	37	141	193	244	400
Blair	1,878	2,247	369	594	706	818	1,155
Blake	1,147	1,332	185	318	385	451	651
Churchill	1,323	1,426	103	246	317	388	602
Clarksburg	1,275	1,146	-129	-14	43	100	272
Damascus	910	937	27	121	168	214	355
Einstein	851	1,430	579	722	794	865	1,080
Gaithersburg	1,381	1,800	419	599	689	779	1,049
Walter Johnson	1,477	1,855	378	564	656	749	1,027
Kennedy	1,167	1,333	166	299	366	433	633
Magruder	1,192	1,656	464	630	712	795	1,044
R. Montgomery	991	973	-18	79	128	177	323
Northwest	1,808	1,971	163	360	459	557	853
Northwood	847	1,339	492	626	693	760	961
Paint Branch	1,189	1,308	119	250	315	381	577
Poolesville	371	472	101	148	172	195	266
Quince Orchard	1,252	1,532	280	433	510	586	816
Rockville	817	972	155	252	301	349	495
Seneca Valley	1,199	1,468	269	416	489	563	783
Sherwood	1,272	1,475	203	351	424	498	719
Springbrook	1,046	1,215	169	291	351	412	594
Watkins Mill	1,090	1,260	170	296	359	422	611
Wheaton	1,398	1,570	172	329	408	486	722
Whitman	1,186	1,267	81	208	271	334	524
Wootton	1,456	1,583	127	285	364	444	681

High School Enrollment and MCPS ProgramCapacity

Cluster Area	Projected Sept. 2011 Enrollment	100% MCPS* Capacity With Council Amended FY07-12 CIP	Capacity Remaining (in Stu city Remaining (in Students) 100% Capacity Remaining at 100% of MCPS Capacity	110% Capacity Remaining at 110% of MCPS Capacity	115% Capacity Remaining at 115% of MCPS Capacity	120% Capacity Remaining at 120% of MCPS Capacity	135% Capacity Remaining at 135% of MCPS Capacity
B- CC	1,628	1,656	28	194	276	359	608
Blair	2,469	2,840	371	655	797	939	1,365
Blake	1,798	1,715	-83	89	174	260	517
Churchill	1,969	1,985	16	215	314	413	711
Clarksburg	1,462	1,629	167	330	411	493	737
Damascus	1,384	1,625	241	404	485	566	810
Einstein	1,545	1,575	30	188	266	345	581
Gaithersburg	1,981	2,094	113	322	427	532	846
Walter Johnson	2,030	2,199	169	389	499	609	939
Kennedy	1,405	1,718	313	485	571	657	914
Magruder	1,757	1,954	197	392	490	588	881
R. Montgomery	1,883	1,967	84	281	379	477	772
Northwest	2,100	2,187	87	306	415	524	852
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Paint Branch	1,665	1,899	234	424	519	614	899
Poolesville	1,063	1,094	31	140	195	250	414
Quince Orchard	1,759	1,791	32	211	301	390	659
Rockville	1,106	1,585	479	638	717	796	1,034
Seneca Valley	1,367	1,497	130	280	355	429	654
Sherwood	2,059	2,054	-5	200	303	406	714
Springbrook	1,915	2,148	233	448	555	663	985
Watkins Mill	1,623	1,890	267	456	551	645	929
Wheaton	1,385	1,472	87	234	308	381	602
Whitman	1,853	1,909	56	247	342	438	724
Wootton	2,326	2,031	-295	-92	10	111	416

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